

Soft Sys



www.MembershipAdmin.Com

MASS User Guide

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MASS

The Membership Administration Software Solution - **MASS** - is a flexible management database system designed to maintain membership records and activity management requirements.

It is an excellent tool for clubs and associations, businesses, churches, schools, kindergartens, sporting clubs, gymnasiums, customer service centres and community service organizations.

MASS has two versions: **Standard** and **Professional**. Included are many powerful features such as subscription management, activities, enrolments and attendance, special interests, billing and cash receipts, expenses, form letters, import and export of data and flexible reporting capabilities.

There are also several add-on modules which can be tailored to your needs for competencies, teams, direct deposits and conferencing.

As with any computer management information system, it is only as good as the information input into it. It is critical that all data be accurate and structured in a consistent manner.

This manual is written to explain both versions. Where a particular functionality is restricted to one or other of these versions, this is indicated in the text.

Sample

SYSTEM REQUIREMENTS

MASS runs on Windows 95/98/ME/NT/NT2000/XP/Vista. Minimum requirements are a Pentium PC with at least 32 megabyte of RAM, and 30 megabytes spare on the hard drive.

Installation

Double-click the downloaded/supplied file and follow the instructions. This file is a self-extracting file and may take up to several minutes to load onto your computer.



Once the software is installed, click the **MASS** icon (shown above) on your desktop.

Alternatively, press the start button , select *Programs*, *Membership*, and then *Members*. This will display the Login dialogue box.

If you encounter any difficulties please contact info@membershipadmin.com.

Login Dialogue Box

You have a responsibility to your members to keep their personal information private and confidential. To secure your member's personal data, **MASS** provides a secure login system in order that only registered users access data.



The login window displays your **MASS Registration name** and your Logo (optional), as set in [System Settings>User Information](#) and [System Settings>Environment](#). If you intend placing your logo on this screen, the logo file should be 501 x 139 pixels in size.

Login ID - your name or your PC name will appear in the login window by default (it is taken from your *Windows* login name). You can enter your Login ID, or select a Login ID using the prompt or [F4] key to bring up the lookup window (which shows Login IDs that have been entered in the user list by the Administrator).

Password - use the TAB or ENTER keys to move the cursor to the **Password** field, and enter your supplied password. Press *Login* to enter, otherwise *Cancel* to abort.

The password is case-sensitive, so take careful note of the CAPS LOCK and SHIFT keys when entering your password. As Administrator, if you forget your password, login as *Demo* and [re-register MASS](#).

Pressing the *PDF Help* button or [F1] key at any time will bring up this help system.

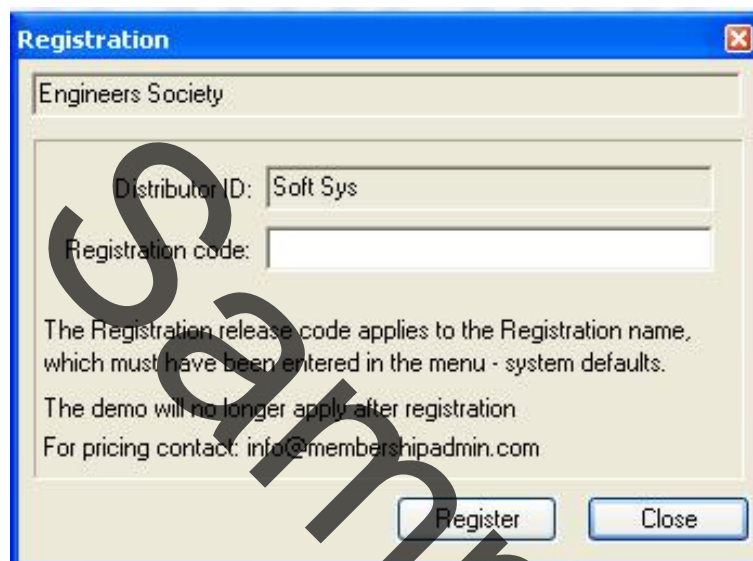
i On the first use of **MASS** the system administrator must login as *Administrator* and enter the password supplied by the software distributor. This gives access to the [User Login Maintenance](#) where the Administrator can change their password and also set up the list of potential users.

Only user names entered by the Administrator can subsequently be used to login. Each user can then set his/her own password.

Administrator is the only user level able to modify [System Settings](#).

i If using the system as a demonstration version, you can only input 20 member records. The password is *Demo*.

i To Log off from **MASS** just exit the application.



The **Registration** name is recorded in the [System Settings>User Information](#) facility when initially setting up **MASS**. This name is displayed at the top of the Registration window. It will be blank if no Registration name has been recorded.

Distributor ID – the ID of the distributor from whom the software has been purchased.

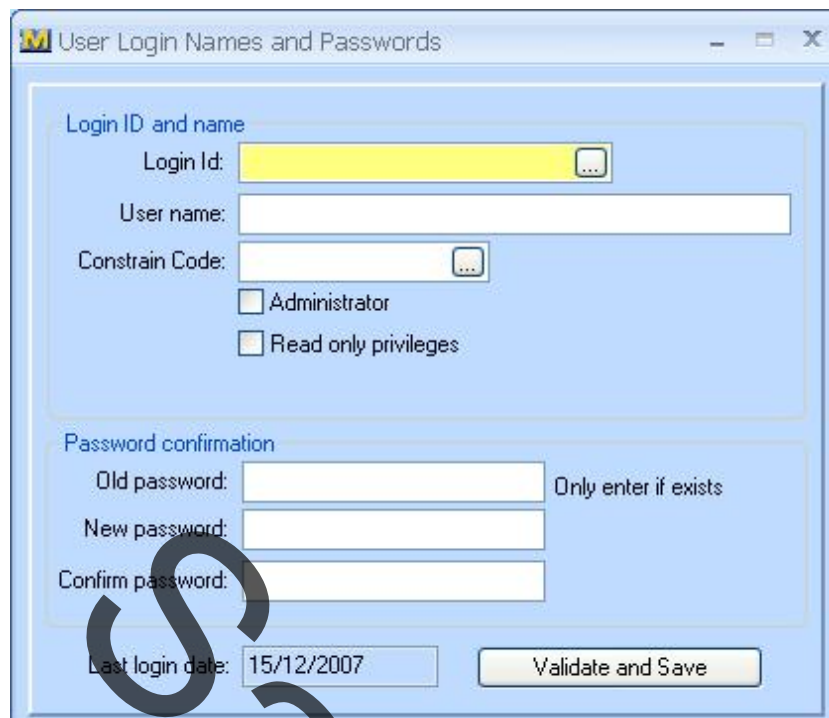
Registration code – enter the release code as supplied to you by the distributor. This will allow your software to be registered. Without a legitimate entry **MASS** will only work in demonstration mode.

i Note that the **Registration code** is case-sensitive, and must be typed in exactly as it has been given to you.

Press *Register* to accept entry, or *Cancel* to abort.

When registration is successful, an information box appears which states the version type (eg single user/multi user/enterprise).

User Log in Maintenance



A user may be an *Administrator*, a *User* or a *Read only User*.

The User Login Names and Passwords screen has 2 purposes:

- the Administrator sets up the User list (Login ID and User name), optionally assigning:
- a Constrain Code (set in [System Settings>Options>System>Settings \(General\)](#)). This constrains the user to view only a subset of the member records – the subset is determined by the value in the *Classifier 3* field;
- an additional status of *Administrator* or *Read only* to that user; and
- an initial password; and
- the user changes their Password (they may do this when they login for the first time, changing the Administrator-assigned password to one of their own choice).

The last login date for each user is also displayed.

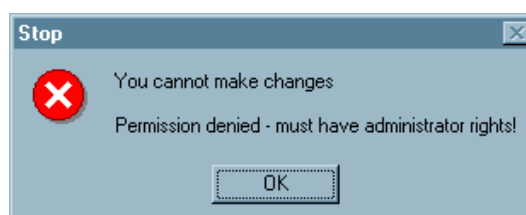
i The Administrator must set up the Login ID and User name before a Password can be set.

Login ID - enter a Login ID for each user, for example, their initials.

User name - enter full name. Both fields may be the same if you wish.

Constrain Code (if visible, as set in [System Settings>Options>System>Settings \(General\)](#)) – [Look-up](#) your selection.

Administrator – only someone with Administrator rights can give Administrator rights to another user. This is done by ticking this checkbox. If an unauthorized person attempts to do this the following Stop message appears.



Read only privileges – data can be viewed but not modified.

Old password – enter the old password only if a change of password is required (ie a password already exists).

New password – enter the new password if setting a password for a new user or a change of password is required.

Confirm password – confirm the new password, exactly as entered in *New password* field, if setting a password for a new user or a change of password is required.

Login Date – the system displays the last login date for each user automatically.

Specific User Requirements

Your organization may have specific needs that **MASS** may not currently cater for. An example would be a particular scoring system or member statistics. If that is the case, we are happy to negotiate a fee to customise **MASS**.

Help

MASS comes with a full manual provided in PDF format which can be printed or viewed on screen.

Sample

GETTING STARTED

Understanding the different MASS systems

Before you can effectively use **MASS**, you must familiarise yourself with the main systems that make up **MASS**.

Member System

[The Member System](#) appears on starting **MASS**. It stores the personal data of members, including name, addresses, phone and fax numbers, email and web addresses. There is a facility for comments, a photograph of member in .BMP, .GIF or .JPG format, and keeping notes on individual members.

Members can be classified into groups and sub-groups using various classifications, codes and checkboxes.

The database can be configured to suit your particular purpose. Some field labels and all code data are user-definable. The first Tab of the member screen can also be partially designed to suit your needs.

Employer System

[The Employer System](#) can be used to store contact information of companies / external organizations that are involved with your organization or associated with your members. They could be suppliers, supporters, sponsors or employers. This is a label that can be changed. For example it could be set to 'Company'.

Subscription System (generally only Standard version)

[The Subscription System](#) stores information about different subscriptions and the members subscribed into them. Members can be subscribed into a subscription, and lists of members and payments for any subscription can be output.

Subscriptions can be classified using codes.

Activity System

[The Activity System](#) stores information about the activities in which members participate.

Members can be enrolled into an activity and lists of members for any activity can be output. Costs, number of enrolments, available places, cash receipts and activity results are all easily stored and related to both the activity and member databases.

Activities can be classified into groups and sub-groups using various activity codes.

Invoice System (Professional only)

[Invoicing](#) allows you to automatically produce and manage invoices for your members or customers. It will automatically generate invoices, receipts and statements.

Cash Receipts System

[Cash Receipts System](#) keeps a record of all member fee transactions. Method of payment, bank details, credit card details, amounts and receipt numbers can all be recorded. Bank listings and credit card listings can be automatically generated.

Attendance System (Add-on module)

The [Attendance System](#) is used to register the date and time of actual attendance of members into an activity.

Member Message System

[The Member Messages System](#) allows you to enter a short message for a selected member. It will automatically be displayed when a member 'attends' or whenever a Member's record is displayed.

Reminder System

[The Reminder System](#) allows you to enter a date, issue description, date completed and comments. Reminder can be automatically displayed when starting up **MASS** (see [System](#)

[Options](#)). Its main purpose is to remind the user of management issues that need to be performed next time the user logs in.

Family System (Add-on module)

[The Family System](#) allows members to be grouped as a family. In Professional there is the ability to bulk change a family's address and associated reporting and mail-merge functions.

Expenses System (Add-on module)

[The Expenses System](#) records incidental daily expenses and payments, showing amounts outstanding. Includes associated reporting and mail-merge functions. This system is quite separate from the Cash Receipts System and the amounts are not included in the Member Current Balance.

Special Interests System (Add-on module)

[Special Interests](#) can be set up, with a facilitator (optional), and each member linked to **many** special interests. Includes associated reporting and mail-merge functions. Also useful for tracking committees and their members.

Reporting System

[The Reporting System](#) provides extensive reporting and mail merge features.

Periodic Payment System (Add-on Module)

The Periodic Payment System automates the process of bulk direct debit or credit card billing (contact Soft Sys for further details).

Bill Pay System (Add-on Module) (Professional only)

[The Bill Pay System](#) automates the process of updating payments made by Bill Pay in Cash Receipts (contact Soft Sys for further details). Only applies in some countries.

Data Entry

Each member is one record of the *Membership System*. Each record consists of many fields containing information about that member.

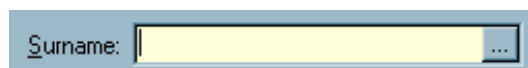
Data is entered in response to a field name prompt. The position in which the data is to be entered is called a field and is indicated by a flashing cursor. In this document, a field name is indicated in *Italics*.

Some fields **must have** data entered and the user is not allowed to proceed until this is done. If the data you enter is invalid then the computer will display an error or information message.

Sometimes default values are displayed. To accept these, press ENTER or TAB through the field.

Avoid using commas within fields, as this can cause errors with mail-merging data with your word processor.

Searchable Fields



A searchable field allows you to scroll through that specific field in alphabetical and numerical order. To scroll, use:

- [F7] to go back one record;
- [F8] to go forward one record; or
- use the arrow icons in the toolbar along the top of screen.

i If you wish to scroll through records from the record you are working on, and if you have made any changes to that record, you will lose those changes unless you 'Save and no clear' first.

A warning message is displayed (on all searchable fields except Member number): 'Find operation will lose existing changes. Press 'Yes' to Save and continue finding new record'.

Searchable fields are designed to appear with a yellow background.

The **Surname** field has auto-complete functionality.

i **Surname, Member number, Number & Street, (Post/Zip) Code, Preferred Name, Occupation, Email, Employer and Registration** scroll through member records.

Member type, Category, Classifier 1, Classifier 2 and Classifier 3 fields scroll through their own individual selection lists, and not through the member records.

Read-only Fields

A screenshot of a form field labeled "Member number:" followed by a text input box with a greyed-out background, indicating it is read-only.

Values in read-only fields appear with a greyed-out background. They are displayed only, they cannot be edited. An example is the **Member number**, which is automatically assigned and unique for each member and cannot be written over; it is only searchable.

Caps Lock

The upper/lower case formatting is performed automatically where it is important, so there is no need to worry about whether caps lock is on or not. However, working with caps lock off is easiest.

Look-up / Prompts

The  button in the tool bar (or [F4] function key) can be used to pop up a look-up table or table of values to help you select a value for a prompted field.

The prompt or look-up button  next to a field indicates that you can display a list box of possible values.

Most fields with a prompt or look-up button  are described in the [Add/Edit](#) drop-down menu section of this manual. The value entered in a prompted field must be selected from one of the prompts available.

To leave it blank, a blank code must be entered in the codes.

When the look-up table appears select your choice or start typing the characters of the word you are searching for. To search on a different column, click on that column.

Press Ok in the search box to go to the nearest match.

Fields that have a prompt can be indicated by a range of icons:

	Click column heading button for look-up table prompt
	Click up/down arrows to scroll through values
	Click down arrow to display pull-down selections

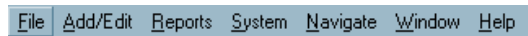
Look-up Tables

Pressing this prompt , or the [F4] key, will display a look-up table. An example of the activity look-up table is shown. In most cases you are able to click on the column heading and the data will be immediately re-sorted by that field.

Code	Name	Organiser1	Organiser2	Start date	Enrolled	Available	Cost
V00001	Cooking Night	Robert Nash		26/05/2000	0	1000	100.00
V00002	Annual Bowling Competition 2000	Kaami Shah		02/06/2000	8	4	14.40
V00003	Informal Programming Night	Robert Nash		28/01/2000	1	19	0.00
V00004	Beach Night	Robert Nash		04/02/2000	0	0	0.00
V00005	Unit Council	Unit Council		11/02/2000	0	0	0.00
V00006	Mr Puniverse Competition	Marty Holt		11/02/2000	0	0	0.00
V00007	Wave Pool	Robert Nash		18/02/2000	0	0	3.00
V00008	Group Registration BBQ	Group		20/02/2000	0	0	0.00
V00009	Death by Chocolate	Michael Wickham		03/03/2000	0	0	4.00
V00010	Speaker: Natopathy	Robert Nash		17/03/2000	0	0	0.00

OK Cancel Search...

Menu Bar



By clicking the cursor onto the required word a pull-down menu will appear. Alternatively, press the Alt key + the underlined letter of the required word, to access the pull-down menu.

Pull-down Menu

Linked to each of the seven words of the menu bar is a pull-down menu. Each pull-down menu contains information or completes functions of a similar nature. Pressing the first letter of a pull-down menu item takes you to that item.

Message Line

Date joined (Control+D for todays date)

At the bottom left of the main window is a display line for relevant, helpful messages.

Keyboard Keys

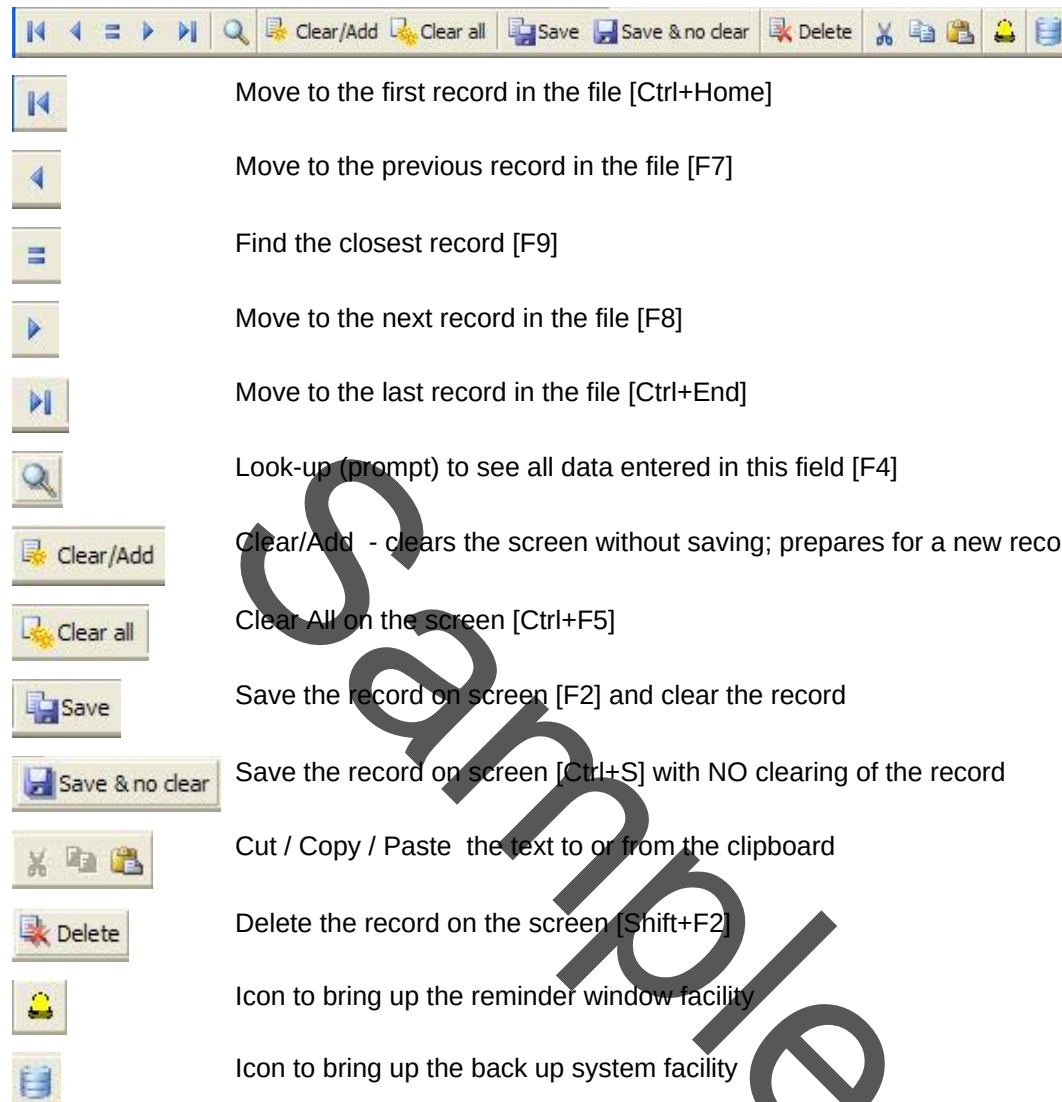
Keyboard	Description
Up/Down Arrow Keys	Move to previous/next field
Left/Right Arrow Keys	Move to previous/next character
Enter	Accept a value for a field and move to next field
Tab	Moves between fields on screens
Backspace	Move back a character
Shift+Tab	Move back a field
ESC	Close window / Exit program
PgUp	Scroll back to prior area/page
PgDn	Scroll forward to next area/page
Home	Move cursor to beginning of line
End	Move cursor to end of line
Ctrl+Home	Move to first record in the file
Ctrl+End	Move to last record in the file
Ctrl+D	Insert Current Date (in any date fields)
Ctrl+P	Prints Screen in Members, Activities and Cash Receipts
Ctrl+S	Save the record on screen, and DO NOT clear the record
Ctrl+R	Switch to Cash Receipts System
Ctrl+M	Switch to Member Message System
Ctrl+P	Switch to Payments System (Professional version)
Ctrl+B	Switch to Billing System (Professional version)
Ctrl+I	Switch to Invoice Transactions Systems (Professional version)
Ctrl+T	Switch to Member Invoice Transactions (Professional version)
Ctrl+1	Switch to Member System
Ctrl+2	Switch to Activity System
Ctrl+4	Switch to Enrolment by Activity
Ctrl+5	Switch to Mass Enrolment sub-system
Ctrl+6	Switch to Team Enrolment sub-system
Ctrl+7	Switch to Team Results sub-system
Ctrl+8	Switch to Attendance System
Ctrl+9	Switch to Company System
Alt+H	Help
Alt+number	Moves to membership/activity tab number
Alt+home	Moves cursor to beginning of member surname field

Functions Keys

Function Keys	Description
F1	Context sensitive help
F2	Save the record on screen, and clears the record
F3	Exit
F4	Prompt options
F5	Clear entry windows / Clear/Add
F6	Switch forward to next area/page
F7	Go to Previous record
F8	Go to Next record
F9	Find the nearest match (after typing one or more characters)
F10	Menu action bar
F12	Save with no clear
Alt+F4	Exit Membership System
Ctrl+F5	Clear All on the screen
Shift+F2	Delete field/record on the screen
Shift+F4	Print screen
Shift+F5	Refresh screen
Shift+F6	Switch back to previous area/page
Shift+F7	Superfind previous: find/display next set of records/data
Shift+F8	Superfind next: find/display next set of records/data
Shift+F9	Superfind: find/display matching/next set of records/data

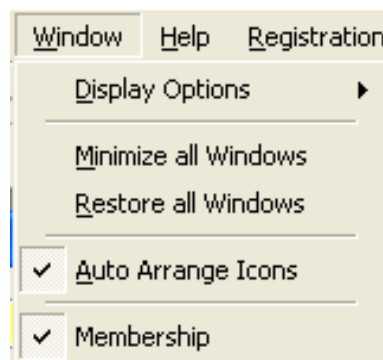
Tool Bar Symbols

The tool bar appears along the top of the main **MASS** window. You can turn it on or off using the Window menu. It is recommended that it remain on.



Window Display Options

The window pull-down menu allows you to control which tool bars are displayed, and how the different membership windows are displayed on the screen, ie tile or cascade.



Display Options – toggles the tool-bar, status-bar on or off. It is recommended that they all remain on.

Cascade – automatically places the open windows in a cascade arrangement, one behind the other.

Tile Horizontally – automatically places the open windows in a horizontal tile arrangement, one beside the other.

Tile Vertically – automatically places the open windows in a vertical tile arrangement, one beside the other.

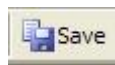
Minimize all Windows – minimises all windows.

Restore all Windows – restores all windows.

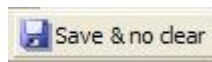
Auto Arrange icons – arranges icons within desktop.

The bottom section of the pull-down menu shows the windows/systems that are open. The window name with the tick beside indicates the active (uppermost) window.

Save a Record



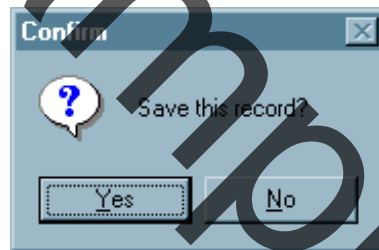
Save the record on screen [F2] and clear the record



Save the record on screen [Ctrl+S] with NO clearing of the record

Whenever you **Save**, you may be prompted to *confirm the saving*, see graphic below. Click Yes, or press ENTER if the Yes button is highlighted. Save confirmation is, by default, turned **off** in the [System Settings>Options](#).

If you close a screen without saving, you will ALWAYS be prompted – this functionality cannot be turned off in system settings.



Data entered **in a screen** must be saved using the Save keys and icons described above.

Data **in a table** (eg the Expenses screen) is saved automatically as you move off the line

Setting up a New Member

TAB or **ENTER** your way through the fields, beginning with **Surname** and **First Name** and continuing through all fields, entering details as necessary. Some fields require a valid entry and the system may indicate with a message that your input is not correct or missing.

When finished entering / editing the member details [save a record](#). When saving a new record, a unique **Member number** is automatically allocated by the system.

Editing a Record

[Look-up](#) or find the required member on the **Surname** field, or any other [searchable field](#).

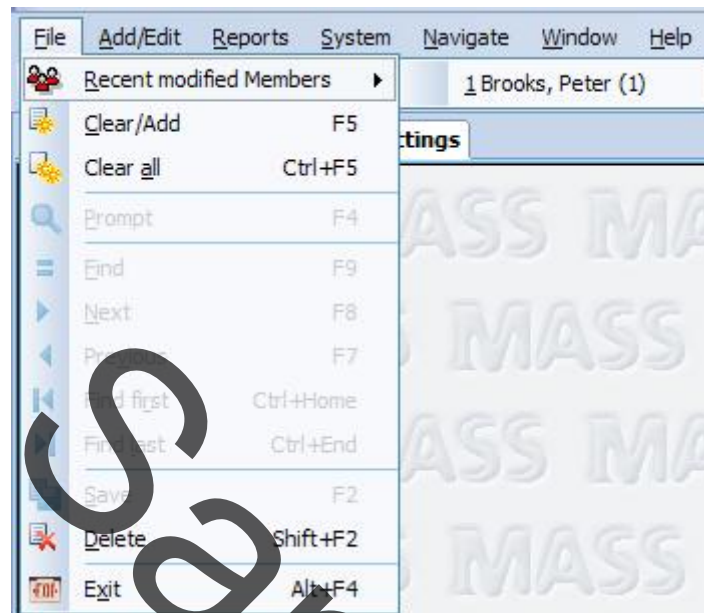
All fields can be edited, except read-only fields (appearing with grey background) such as **Member number** and **Current Balance** of fees. You must actively save the new record to keep these changes.

Use the backspace key to correct typing errors. To remove all the text within one field, select the text by clicking the mouse cursor at the start of the field, then dragging cursor from left to right until all text is selected. Then hit the delete key or right click on the mouse over the highlighted text and select delete.

In a similar way you can cut and paste field information between records, as well as to and from other applications. Just highlight the text you want to cut and paste by click and dragging the mouse, then right click on the mouse over the highlighted text and select cut (or copy). Click cursor into the field where you want the text placed, right click on the mouse and select paste.

When finished editing the member details [save a record](#).

A list of the ten most recently edited Member Records is available from the File menu.



Constraining the viewable Member Records

To constrain the number of records on display you have two options.

- Go to [System Settings>Options>System>Settings\(General\)](#) and specify 'Use Login constraint on Member records (using Classifier 3)', which means viewable Member Records are filtered according to the Users rights as set using Classifier 3 in [User Log in Maintenance](#)
- Go to [System Settings>Options>System>Settings\(Active\)](#) and specify 'Constrain Member Records by Active only', which means only Active members are displayed OR

Deleting a Record

Generally, when you want to delete data use [Shift + F2] or the  icon.

To confirm deleting a record, click Yes, or press ENTER if the Yes button is highlighted, as in graphics below.



Deleting a Member Record

[Look-up](#) or find the member on the **Surname** field, or any other [searchable fields](#).

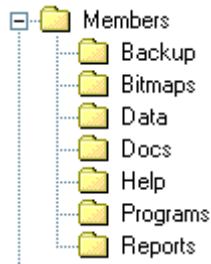
Delete the member record by pressing [Shift + F2] or the  icon. An on-screen message asks you to confirm if you want to delete this record with Yes or No.

Only if there are no transactions relating to this member (such as enrolment, history, cash receipts and family) can their record be deleted in this way.

The **MASS** system is designed for long term record keeping and can handle hundreds of thousands of records with ease. Therefore it is not designed to allow for routine deletion of member data. The member record cannot be deleted without deleting all related records first. This may be performed manually or by use of the routine ?? System > Maintenance > Delete a member and all their related records (a password is required to perform this routine).

File Organisation

MASS files are located on the drive selected during installation. The main folder is called "Members", and consists of several sub-folders. An example of such a file structure could be:



Backup – available for backup of all your Member files if re-installing later releases of **MASS** .

Bitmaps – contains .bmp .gif and .jpg graphics files; all member photo files should be stored here; the start-up sound file (.wav), window background (.bmp) and system logo (.bmp or .gif) image files are stored here.

Data – contains current data files and related files.

Demo – contains demo data which can be 'played with' when familiarizing oneself with the system.

Docs – contains the word-processor documents that **MASS** uses in mail-merging and exporting of data.

Help – contains the context sensitive help files.

Lib – contains ancillary programs, such as related Dataflex and the VPE viewer programs.

Programs – contains the **MASS** program files.

Reports – contains standard report examples.

Deskbank – files used for direct banking, if installed.

SETTING UP MASS

MASS comes as an empty database and before beginning to enter data it is necessary to configure it to suit your requirements.

Enter your membership registration and user information in [System user information](#).

Enter [System environment](#) information and set values in [System options](#).

Enter [System defaults](#) (you may not need to do anything in here).

Configure [System label names](#) – certain field names and tab labels can be set to suit your organization.

Set up look-up tables in [Add/Edit](#) drop-down menu to suit your organization.

Set up user Login rights in [Login Maintenance](#).

System Settings

Use this menu selection to set and modify particular system settings. Each tab deals with particular areas which can be customized to suit your needs.

User Information

The screenshot shows the 'System Settings' window with the 'User Information' tab selected. The window has a blue title bar and a tabbed interface. The 'User Information' tab is active, showing fields for Registration name, Business number, Address 1, Address 2, Address 3, Email contact, and Phone. Below these are sections for 'Credit card and Bpay information' and 'Bank'. The 'Credit card' section includes Merchant name, Merchant number, CDTF merchant id, Merchant number 2, Biller (BPAY) mailbox, and Biller code. The 'Bank' section includes Bank, Bank account, Debit Bank code, and Direct Debit User number. A large 'Sample' watermark is overlaid on the image.

User Information	
Registration name:	enter your registration name here
Business number:	
Address 1:	34 Kay Street
Address 2:	Mount Waverley 3149
Address 3:	
Email contact:	
Phone:	

Credit card and Bpay information	
Merchant name:	
Merchant number:	0
CDTF merchant id:	0
Used for electronic payments	
Merchant number 2:	
Used on the top on the credit card reports only, if required	
Biller (BPAY) mailbox:	
Biller code:	
Note: Credit card information is setup via Add/Edit-Credit cards.	

Bank	
Bank:	CBA
Bank account:	123-123-12345678
Debit Bank code:	
Direct Debit User number:	0

This tab sets up information specifically about your organisation that may be used in automatically generated reports.

Registration name - enter the name for your organization. This will appear as the title on the membership window, and on standard reports. This name should be supplied to the software distributor when you register **MASS**.

Business number – enter your business or company number, if relevant (used in invoicing).

Address 1- 3 – enter your address. You can also include postal address (used in invoicing).

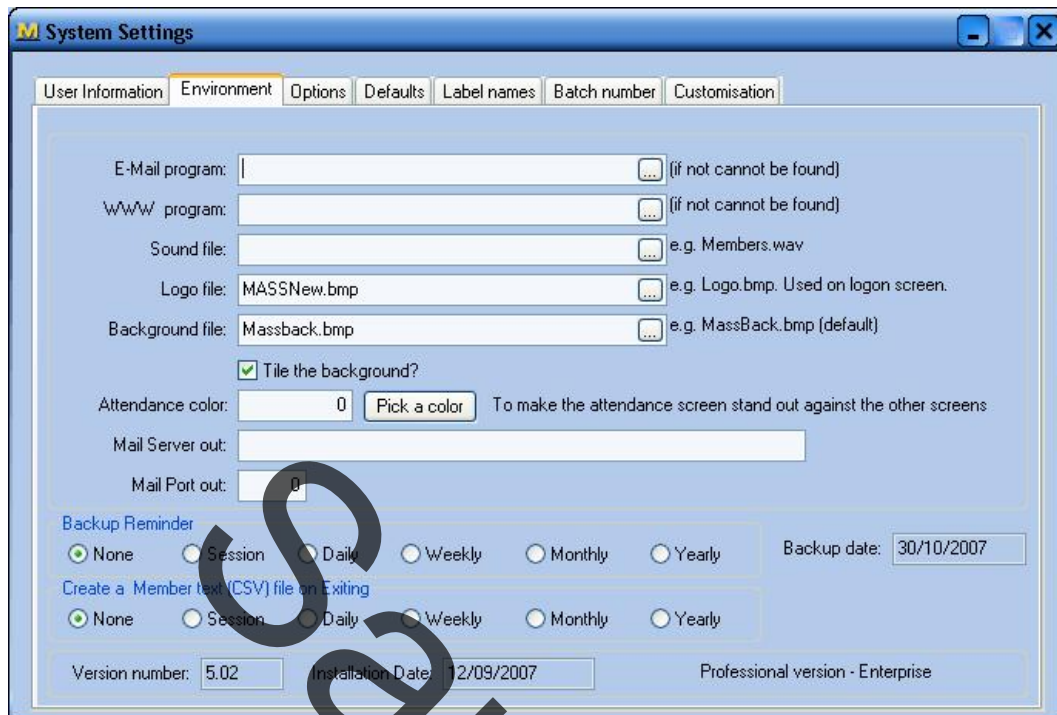
Email contact – [used in on-line module only]

Phone – [used in on-line module only]

Credit Card Information – enter your credit card merchant name and number. These details are incorporated on credit card periodic payment reports. Only applicable if Periodic Payment module is installed.

Bank – enter you bank name and account number. These details are displayed in Cash Receipt Reports.

Environment



This tab sets up related programs and files that MASS uses, as well as back-up details.

Email Program – necessary only if you have not set up a default program in Windows.

www Program – necessary only if you have not set up a default program in Windows.

Sound file - enter the .wav file located in the `members\bitmaps\` directory. This plays on starting up MASS. The default sound is "members.wav". If no file name is given, no sound will play!

Using a sound file slows down the application start-up time.

Logo file - enter the name of the graphics file to appear as your organization's logo within MASS. The file may be a .GIF, .JPG or .BMP file, and must be located in the `members\bitmaps\` directory. The default logo is "MASSWelcome.bmp".

Background file – enter the name of the graphics file to appear as the application wallpaper within MASS. The file must be a.BMP file, and must be located in the `members\bitmaps\` directory. The default is "MassBack.bmp".

Tile the background? – check this box if a small image is being tiled to create the wallpaper.

Attendance colour – pick a colour for the [Attendance System screen](#). This is to make it look distinctive compared to other windows. Users who use the attendance screen frequently may find this beneficial.

Mail Server out – enter the mail server eg mail.dcsi.net

Mail Port out – on most PCs this is set to 25.

Backup Reminder – select the frequency at which you are reminded to back-up your database (only appears as you exit the application) – None, after each Session, Daily, Weekly, Monthly or Yearly. It is recommended you back-up your data at least daily.

Backup date – displays the date of the last back-up using the MASS back-up facility.

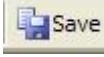
Create a Member text (CSV) file on Exiting – select the frequency at which you will be reminded to create a Member text (CSV) file (only appears as you exit the application) – None, after each Session, Daily, Weekly, Monthly or Yearly.

i Only one of *Backup* and *Create a Member text file on Exiting* can be set at any one time. *Backup* takes precedence.

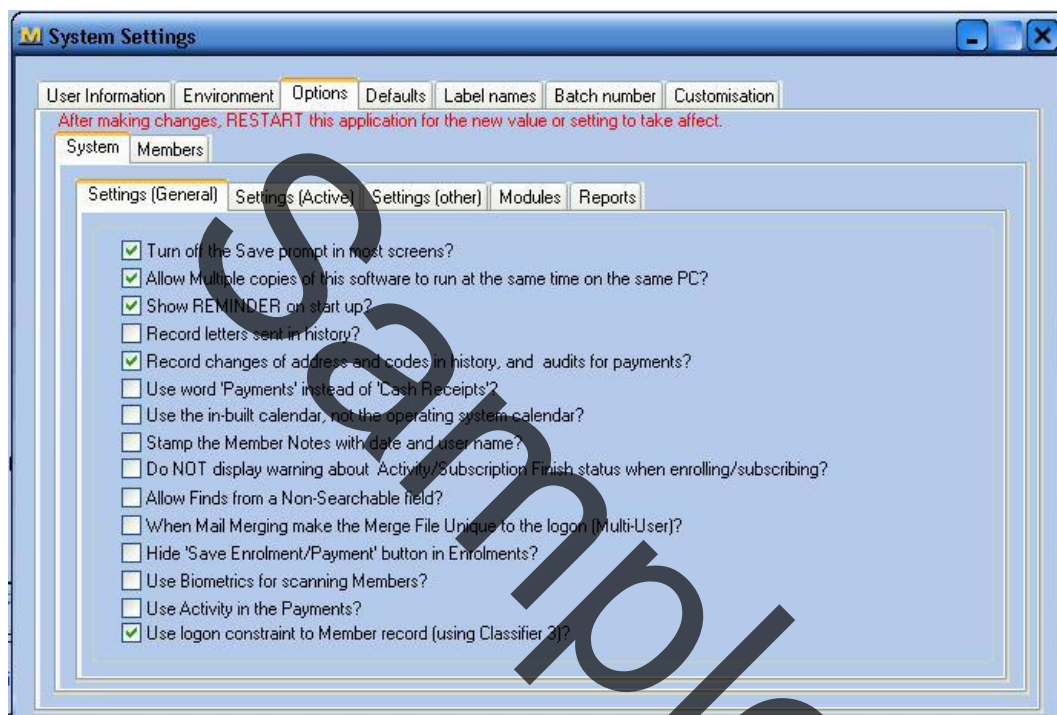
Version number, Installation Date and Version type are all displayed.

Options

This tab (and its sub-tabs) activates and deactivates program modules, and sets up many of the program options or preferences. It is subdivided into several areas. Tick to activate a setting or leave blank to deactivate.

In all tabs, press [F2] or  icon to save entered values.

Options - System - Settings (General)



Turn off the Save prompt in most screens? – turns off the [save confirmation](#) box which usually appears automatically when a save is required.

Allow Multiple copies of this software to run at the same time on the same PC? – allows the program to start up multiple times. It is not recommended to allow this, but it may be applicable if you want to have the demonstration data loaded at the same time as your data.

Show REMINDER on start up? – the [Reminder](#) screen appears whenever you start MASS.

Record letters sent in history? - when a mail merge is done it is recorded in the [History Tab](#) of that member (date and time).

Record changes of addresses and codes in history (both versions) and audits for payments (Professional)? - when such a change is made in the [Member System](#) the old and new code with date and time is recorded in the [History Tab](#) of that member.

Use word 'Payments' instead of 'Cash Receipts'? – use 'Payments' as the label rather than 'Cash Receipts' through out the application.

Use the in-built calendar, not the operating system calendar? – use the MASS pop-up calendar. Otherwise the application will use the operating system calendar.

Stamp the Member Notes with date and user name? – to save the user name (ie person who edited) and date of modification each time a member record is edited, in the comments field at the bottom of the [Member System](#) main window.

Do NOT display warning about Activity/Subscription Finished status when enrolling/subscribing? – when [enrolling/subscribing](#) no system comment is made about the *Finish* date of that activity or subscription.

Allow Finds from a non-searchable field? – enables the use of [F7] or [F8] to move through records in surname order even when in non-searchable fields.

When Mail Merging make the Merge File Unique to the logon (Multi-User)? - MASS personalises generated merge files to the identity of the user according to their logon unique number – the name of the merge file contains the user's log-on identifier. Used in a multi-user environment.

Hide 'Save Enrolment/Payment' button in Enrolments? – in this case ALL enrolments will result in an invoice being generated.

Use Biometrics for scanning Members? – users may scan in their Member number via an external device.

Use Activity in Payments Received? – allows the user to specify an Activity against a payment. This is then reflected in the Cash Receipts.

Use Login constraint on Member records (using Classifier 3)? – **switches this constraint option on in the Login Names and Passwords screen, see [User Log in Maintenance](#)**

Options - System - Settings (Active)



Make the [Subscription System](#) ACTIVE? – not generally applicable to Professional version.

Make [Setting up an](#) Activity ACTIVE? – turns on this functionality.

Make [Cash Receipts System](#) ACTIVE? - turns off this functionality.

Make [Backup/Restore](#) ACTIVE? – inactivate only if automatic backups are in place.

Make [Import/Export](#) ACTIVE? – recommended to be set to ACTIVE ONLY for the duration of an import/export.

Make Photo Active – activates a Photo tab in the Member Screen.

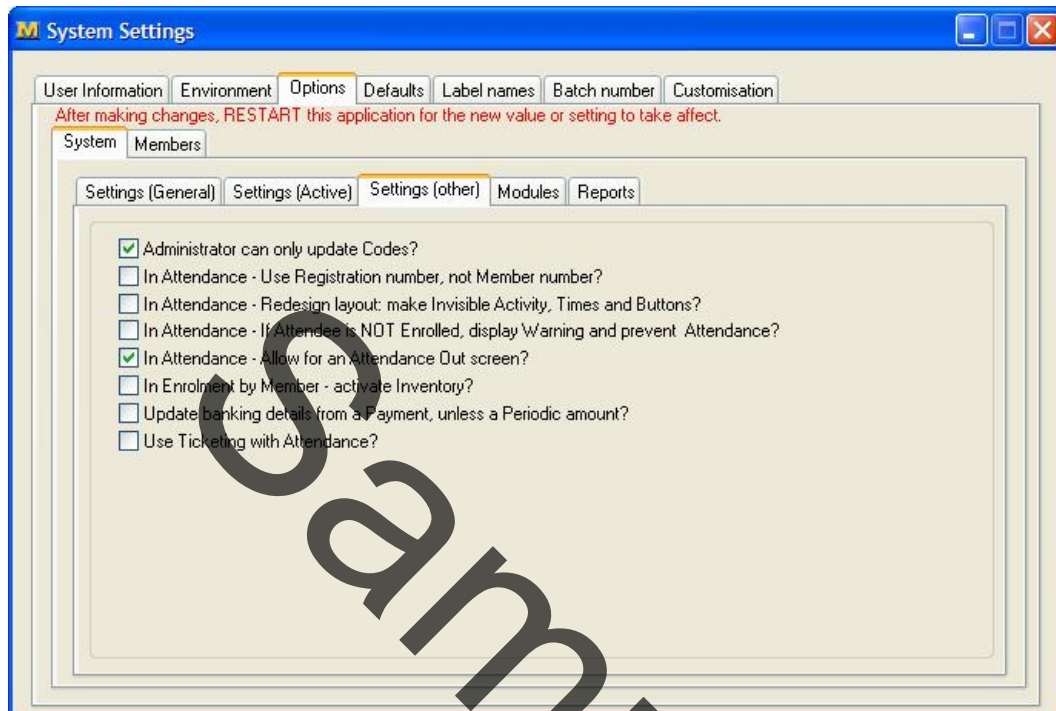
Constrain member records by – you may choose to constrain the members that display in the [Member System](#) windows. By selecting the appropriate option you can show all members (both active and inactive); only active members; or only inactive members. **A member is declared Inactive when the *Date left* field is filled out.**

i Active – if *Date left* field is blank a green tick  appears in the [Member System](#)..

Inactive - If *Date left* field is filled in a red cross  appears in the [Member System](#).

There is an routine to automatically de-activate members according to a set of criteria: [System > End of Period Preparations > .Update Newsletter, Inactive and Date Left](#)

Options - System – Settings (other)



Administrator can only update Codes? – only a user with Administrator rights can update any of the Add/Edit>Member Codes .

In [Attendance System](#) - **Use Registration number, not Member number?** – records attendance via the *Registration number*.

In [Attendance System](#) - **Redesign layout: make invisible Activity, Times and Buttons?** - gives a minimalist attendance screen, suitable for gyms.

In [Attendance System](#) – **If Attendee is NOT enrolled, display Warning and prevent Attendance?** – the user is forced to enrol the member in the activity before they can be marked as attended.

In [Attendance System](#) – **Allow for an Attendance out screen?** – activates the Attendance Out screen in Add/Edit>Attendance>Attendance Out (is this in the manual?).

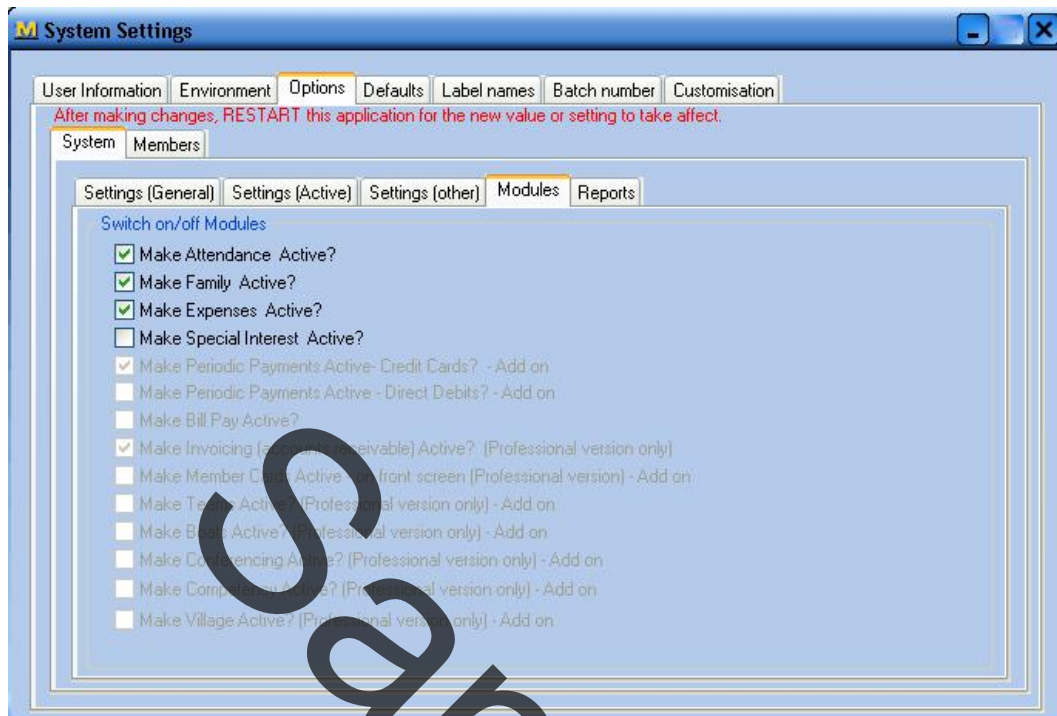
In **Enrolment by Member – activate Inventory?** – adds an extra field to the [Enrol by Member Screen](#) and uses Enrolment values to record stock levels.

Update banking details from a Payment? - controls the behaviour of the [Members>Personal Tab>Payment defaults>>Direct debit details](#). If box is checked any banking details entered in Payments received are transferred to the Members screen).

Use Ticketing with Attendance? – introduces a new field called Tickets to the Member Screen>Codes Tab which allows a user to allocate a fixed number of 'tickets' to a member – this number then decrements every time the member 'attends' as recorded in the Attendance In screen.

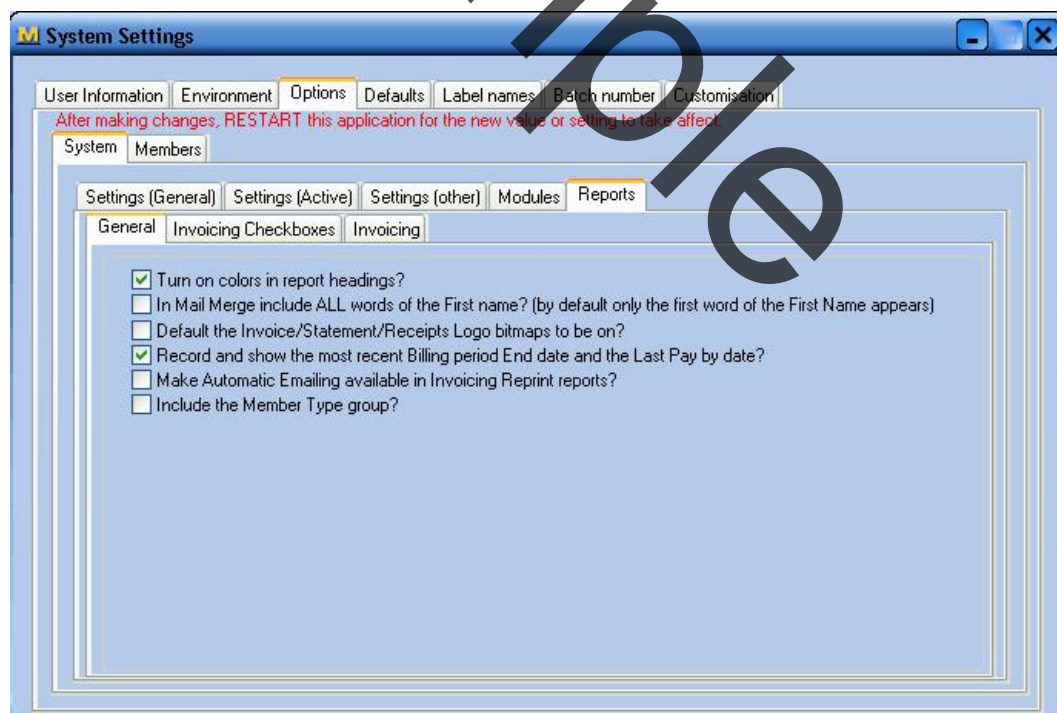
Options - System – Modules

Use this facility to activate and de-activate modules of **MASS**. If a Module is grayed-out it is because it is not available in the version you have registered. Contact info@membershipadmin.com to discuss the 'un-graying of particular modules'.

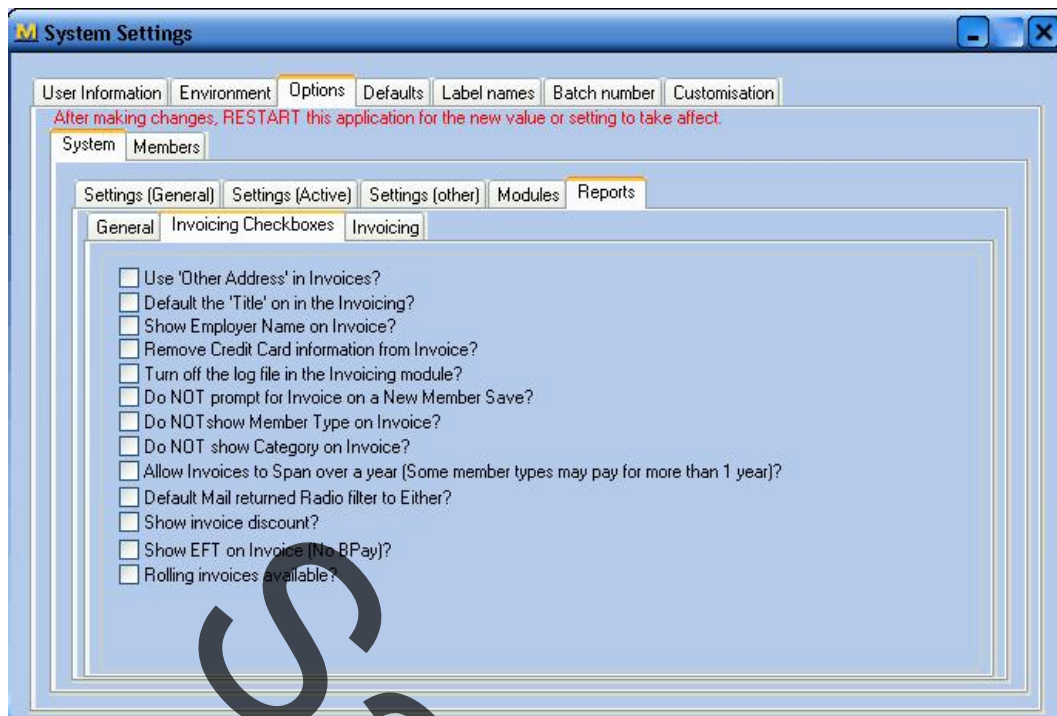


Options - System – Reports – General

Use this facility to activate and de-activate report settings of **MASS**.



Options - System – Reports – Invoicing Checkboxes

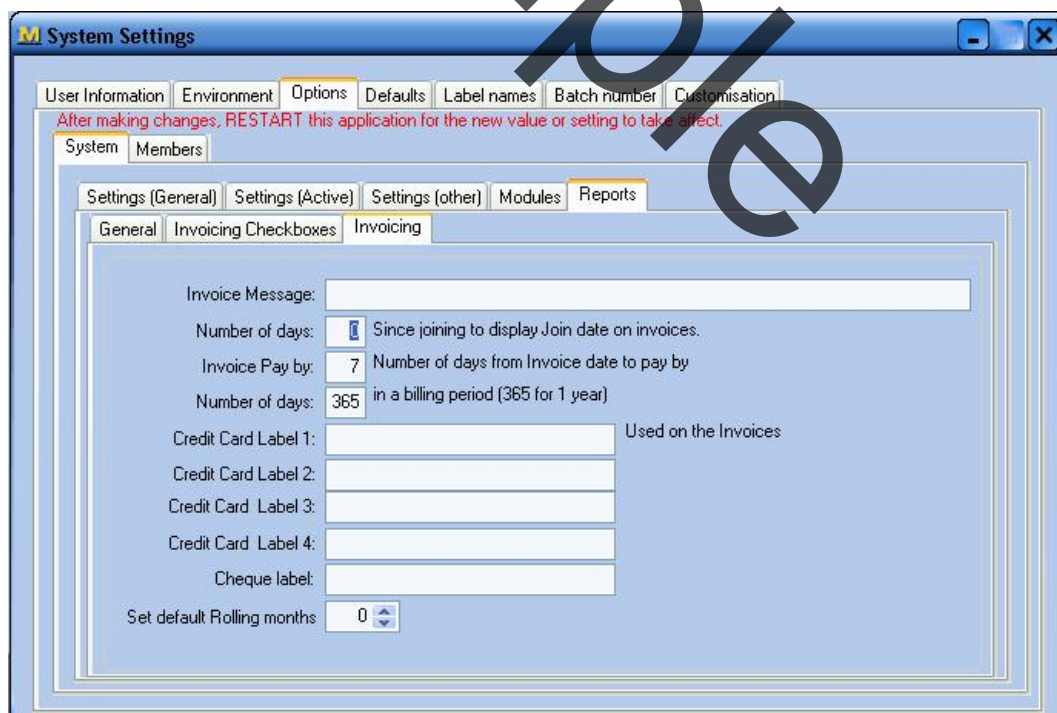


Allows the user to set options around Invoices, many of these are self-explanatory.

Remove Credit Card information from Invoice? – on the invoice tear-off slip do not include the option of paying by credit card.

Turn off the log file in the Invoicing Module – MASS writes a text file of any updates that are automatically triggered during the invoicing process [mainly for customisation clients].

Options - System – Reports - Invoicing



Invoice Message – this message is displayed on all invoices.

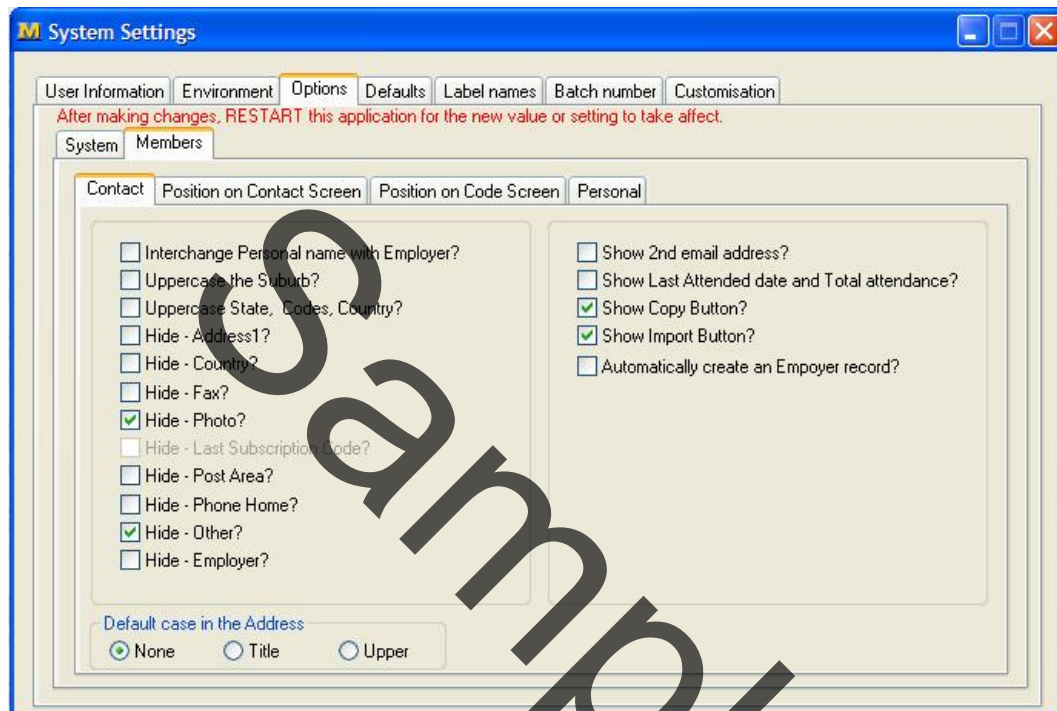
Number of days since joining to display Join date on invoices – will include Join date on invoices if the Join date is within the specified number of days from the invoice generation date.

Invoice Pay by – specifies the number of days that the system adds to the Invoice date (generation date) to get the Pay by date. If the value is zero the Pay by date is set to the day before the start of the Billing Period.

Number of days in a Billing period - billing period length set for the purpose of the pro-rata calculations in invoicing.

Credit Card Label – allows the user to specify four credit card company names to appear on the invoice tear-off slip. By default the invoice has 3 credit cards on it: Bankcard, Visa, Mastercard (in that order). By entering values into these fields the default values are overwritten.

Options – Members - Contact



Allows the user to set options around the Member > [Contact Tab](#). Many of these are self-explanatory.

Interchange Personal name with Employer? - MASS is primarily set up for recording information about individual members or people. If you want to record company information only, then you have the option of setting the main field that appears along the top of this window as *Company Name*, rather than *Surname + First Name*.

Hide Address 1, Country, Fax, Photo, Post Area, Phone Home, Other, Employer? – removes these fields from the contact tab of the [Member System](#).

Default case in the Address? – select 'none' for no change; select 'Title' if you want address to be changed to first letter uppercase, remainder lower case; select 'Upper' is you want entire address automatically change to uppercase.

Show Last Attended date and Total attendance? – displays the most recent date of attendance at any activity and the total number of times the member has attended any activity during the time of their membership.

Show Copy Button? – allows the current record to be copied to a new record with a new membership number.

Show Import Button? – allows importing from a CSV file to create a new member record.

Automatically create an Employer record? – allows free entry into the *Employer field* and automatic save of this record to the [Employer System](#) table on exit from the field.

Options – Members – Position on Contact Screen

System Settings

User Information Environment **Options** Defaults Label names Batch number Customisation

System **Members**

Contact **Position on Contact Screen** Position on Code Screen Personal

Enter the order you would like to see these fields appear on the Contact page
Enter a zero to hide the field.

Preferred name:	1	Checkbox associated with Classifier 1:	0
Registration:	0	Occupation:	7
Registration Expiry Date:	0	Gender:	0
Title:	2	Related members:	0
Category:	3	Balance:	11
Member Type:	4	Attendance:	0
Classifier 1:	0		
Birth date:	5		
Join date:	6		
Subscription:	0		
Web Page:	8		
Newsletter checkbox:	9		
Concession checkbox:	9	Same line as above	
Mail returned:	10		
Checkbox 4:	10	Same line as above	

Allows the user to design the [Members>Contact Tab](#) screen layout – these are all self-explanatory.

Options – Members – Position on Code Screen

System Settings

User Information Environment **Options** Defaults Label names Batch number Customisation

System **Members**

Contact Position on Contact Screen **Position on Code Screen** Personal

Enter the order in which you would like to see these fields appear on the Codes screen
Enter a zero to hide the field.

Title:	0	Receipt Date:	9
Registration:	1	Occupation:	0
Registration date:	2	Web Page:	0
Preferred name:	0	Spare number 1 (6.0):	0
Date left:	3	Spare number 2 (8.2):	0
Join Date:	0		
Year joined:	4		
Category:	0		
Member Type:	0		
Classifier 1:	5		
Classifier 2:	6	☐ Hide - Related members?	
Classifier 3:	7	☒ Hide - Subscription Expiry date?	
Spare Field 1:	8	☐ Hide - Checkboxes area (All)?	
Special Codes:	0	☐ Show User defined Checkboxes?	

Allows the user to design the [Members>Codes Tab](#) screen layout – these are self-explanatory.

Options – Members - Personal

The screenshot shows the 'System Settings' window with the 'Options' tab selected. Within the 'Options' tab, the 'Members' sub-tab is active, and the 'Personal' section is selected. A red message at the top states: 'After making changes, RESTART this application for the new value or setting to take affect.' The 'Personal' section contains a list of checkboxes for hiding various fields: 'Hide - Next of Kin?' (checked), 'Hide - Address?' (checked), 'Hide - Other (replace with Color code)?' (checked), 'Hide - Contact?' (checked), 'Hide - Person Height/Weight/Rating?' (checked), 'Hide - Member Suspensions?' (unchecked), 'Hide - Credit and debit cards and their suspensions?' (unchecked), and 'Hide - Fees?' (unchecked). At the bottom, there is a section titled 'Default gender on a save' with three radio buttons: 'None' (selected), 'Male', and 'Female'.

Allows the user to design the [Members>Personal Tab screen](#) – these are largely self-explanatory.

Default gender on a save – allows choice of default gender type. Select Male for a predominantly male membership, Female for a predominantly female membership or leave at None if mixed membership or if the user is not interested in collecting this data.

Defaults

The screenshot shows the 'System Settings' window with the 'Defaults' tab selected. The 'Defaults' tab contains various fields for setting default values: 'Current Courses' (BANKING), 'State' (VIC), 'Last Member number' (57571), 'Last Receipt number' (70510), 'Last Invoice number' (213697), 'Last Exp Receipt no' (70), 'Tax applicable?' (checked), 'Tax rate' (10.00 %), 'BPay file location' (M:\BPay\BPAY Statement.bai), 'Minimum card amount' (-9999.00), 'Maximum card amount' (20.00), 'Card valid to date' (30/09/2006), and 'Prefix Member number' (empty). Each field has a description of its purpose.

This facility allows you to set values used by this application.

Current Activity – the system stores the code of the most recently added Activity. Used mainly in customised functions.

State - enter up to 3 characters to indicate a state identifier for the most commonly used *State*. This will be the default.

Last Member number – states the last *Member number*. This number is automatically assigned and incremented as each new member is added. The initial value will be zero, unless specified otherwise in this screen. If you want member numbers to begin from 1000, enter 999.

Last Receipt number – states the last *Receipt number*, which should match the organizations' receipt book. This number is automatically assigned and incremented for each subscription/enrolment in Cash Receipts.

Last Invoice number – states the last *Invoice number*. This number is automatically assigned and incremented for each invoice.

Last Exp Receipt number – states the last *Expenses Receipt number*. This number is automatically assigned and incremented.

Tax applicable – indicates the tax status of the organisation and its activities. All fees are entered inclusive of tax.

Tax rate – rate of tax that may be applied to amounts entered in **MASS**. All dollar amounts entered are inclusive of Tax.

Prefix Member number – specifies a prefix to be automatically added to member number (1 character). This may be useful when more than one member database is being maintained.

Label Names

This tab allows you to enter label names as applicable to your organization. NOT ALL label names can be configured.

Label names - System

The screenshot shows a software window titled 'System Settings' with a tabbed interface. The 'Label names' tab is selected. At the top, a red message reads: 'After making changes, RESTART this application for the new value or setting to take effect.' Below this is a row of tabs: System, Contact, Codes, Checkboxes, Personal, Activities, Invoice, Enrolments/Subscriptions, Attendance, and Company. The 'System' tab is active, displaying several input fields on the left and descriptive text on the right:

- System name: [text box] The name of the Application, instead of 'Membership'
- Codes: [text box] Tab Found in Members screen
- Personal: [text box]
- Enrolment: [text box]
- History: [text box]
- Special Interests: [text box]
- Attendance: [text box]
- Medical: [text box] Found in Notes Tab of Members
- Activities: [text box] The name of the 'Activity screen', eg 'Event or Conference'
- Subscription: [text box]

At the bottom of the window, a note states: 'The names of the labels can be changed to a more suitable name to meet your requirements.'

System Name – this name is used to label the system, as appearing in the upper left corner of the main window. The words “..... system for ...” cannot be edited. The label after the “for” is the Registration Name as supplied by the purchaser to the **MASS** distributor.

Codes – variable name for the member [Codes tab](#)

Personal – variable name for the member [Personal tab](#)

Enrolment – variable name for the member [Enrolments tab](#)

History – variable name for the member [History tab](#)

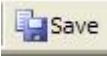
Special Interests – variable name for the member [Special Interests tab](#).

Attendance –variable name for the Attendance tab in the [Activity system](#) and related buttons.

Medical – variable name for the Medical section of the member [Notes tab](#).

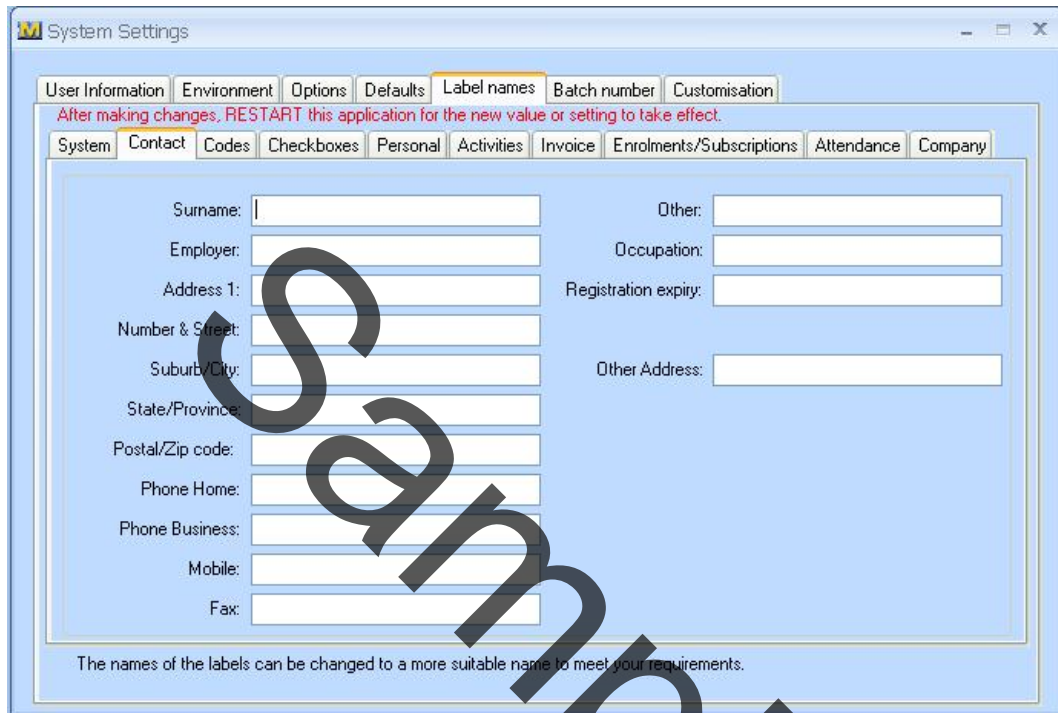
Activities – variable name for the [Activity System](#) and related buttons.

Subscription – ignore – used in Periodic Payments module.

 In all tabs, press [F2] or  icon to save entered values

After making changes, RESTART the application for the new value or setting to take effect.

Label names - Contact



System Settings

User Information Environment Options Defaults **Label names** Batch number Customisation

After making changes, RESTART this application for the new value or setting to take effect.

System **Contact** Codes Checkboxes Personal Activities Invoice Enrolments/Subscriptions Attendance Company

Surname: Other:

Employer: Occupation:

Address 1: Registration expiry:

Number & Street:

Suburb/City: Other Address:

State/Province:

Postal/Zip code:

Phone Home:

Phone Business:

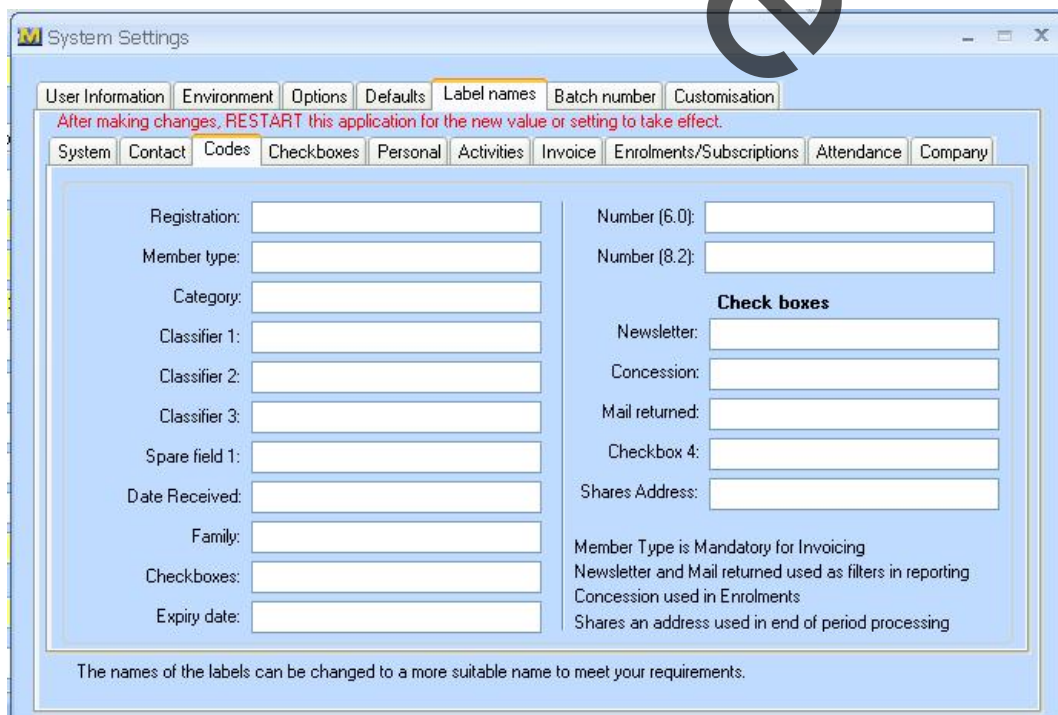
Mobile:

Fax:

The names of the labels can be changed to a more suitable name to meet your requirements.

These are the variable field names appearing on the member [Contact Tab](#). Type a new label to change throughout the application.

Label names - Codes



System Settings

User Information Environment Options Defaults **Label names** Batch number Customisation

After making changes, RESTART this application for the new value or setting to take effect.

System Contact **Codes** Checkboxes Personal Activities Invoice Enrolments/Subscriptions Attendance Company

Registration: Number (6.0):

Member type: Number (8.2):

Category:

Classifier 1:

Classifier 2:

Classifier 3:

Spare field 1:

Date Received:

Family:

Checkboxes:

Expiry date:

Check boxes

Newsletter:

Concession:

Mail returned:

Checkbox 4:

Shares Address:

Member Type is Mandatory for Invoicing
Newsletter and Mail returned used as filters in reporting
Concession used in Enrolments
Shares an address used in end of period processing

The names of the labels can be changed to a more suitable name to meet your requirements.

These are the member code variable names appearing on the member [Code tab](#). Type a new label to change throughout the application.

The purposes of these codes are explained in [Add/Edit](#) look-up menu.

Label names - Checkboxes

System Settings

User Information Environment Options Defaults **Label names** Batch number Customisation

System Contact Codes **Checkboxes** Personal Activities Invoice Enrolments/Subscriptions Attendance Company

After making changes, RESTART this application for the new value or setting to take effect.

These checkboxes are special user defined, which replaces the other checkboxes in the codes page.

Checkbox 1:		Checkbox 11:	
Checkbox 2:		Checkbox 12:	
Checkbox 3:		Checkbox 13:	
Checkbox 4:		Checkbox 14:	
Checkbox 5:			
Checkbox 6:			
Checkbox 7:			
Checkbox 8:			
Checkbox 9:			
Checkbox 10:			

The names of the labels can be changed to a more suitable name to meet your requirements.

These are the variable field names appearing on the various member Checkbox fields. Type a new label to change throughout the application.

Label names - Personal

System Settings

User Information Environment Options Defaults **Label names** Batch number Customisation

System Contact Codes Checkboxes **Personal** Activities Invoice Enrolments/Subscriptions Attendance Company

After making changes, RESTART this application for the new value or setting to take effect.

Next of Kin:	
Address:	
Contact:	
Other:	
Fees:	
Expenses:	

The names of the labels can be changed to a more suitable name to meet your requirements.

These are the variable field names appearing on the member [Personal tab](#). Type a new label to change throughout the application.

Label names - Activities

The screenshot shows the 'System Settings' window with the 'Label names' tab selected under the 'Activities' category. The window has a title bar with a logo and the text 'System Settings'. Below the title bar is a row of tabs: 'User Information', 'Environment', 'Options', 'Defaults', 'Label names' (highlighted), 'Batch number', and 'Customisation'. Below these is a red warning message: 'After making changes, RESTART this application for the new value or setting to take effect.' Below the warning is another row of tabs: 'System', 'Contact', 'Codes', 'Checkboxes', 'Personal', 'Activities' (highlighted), 'Invoice', 'Enrolments/Subscriptions', 'Attendance', and 'Company'. The main area contains six text input fields with labels: 'Location:', 'Organiser1:', 'Organiser2:', 'Category 1:', 'Category 2:', and 'Category 3:'. At the bottom, there is a note: 'The names of the labels can be changed to a more suitable name to meet your requirements.'

These are the variable field names appearing in the [Setting](#) up of an Activity [System](#). Type a new label to change throughout application.

Label names – Invoice (Professional only)

The screenshot shows the 'System Settings' window with the 'Label names' tab selected under the 'Invoice' category. The window has a title bar with a logo and the text 'System Settings'. Below the title bar is a row of tabs: 'User Information', 'Environment', 'Options', 'Defaults', 'Label names' (highlighted), 'Batch number', and 'Customisation'. Below these is a red warning message: 'After making changes, RESTART this application for the new value or setting to take effect.' Below the warning is another row of tabs: 'System', 'Contact', 'Codes', 'Checkboxes', 'Personal', 'Activities', 'Invoice' (highlighted), 'Enrolments/Subscriptions', 'Attendance', and 'Company'. The main area contains two text input fields with labels: 'Not Invoiced:' and 'Tax name:'. To the right of the 'Not Invoiced:' field is the text 'in Member Type (Professional version)'. To the right of the 'Tax name:' field is the text 'eg GST/VAT (leave blank for GST)'. At the bottom, there is a note: 'The names of the labels can be changed to a more suitable name to meet your requirements.'

These are variable field names appearing in the [Invoicing System](#). Type a new label to change throughout application.

Label names – Enrolments / Subscriptions

The screenshot shows the 'System Settings' window with the 'Label names' tab selected. Within this tab, the 'Enrolments/Subscriptions' sub-tab is active. A red message at the top states: 'After making changes, RESTART this application for the new value or setting to take effect.' Below this, there is a single text input field labeled 'Enrolment Category:'. At the bottom of the window, a note reads: 'The names of the labels can be changed to a more suitable name to meet your requirements.'

These are variable field names appearing in the member [Enrolment tab](#). Type a new label to change throughout the application.

Label names - Attendance

The screenshot shows the 'System Settings' window with the 'Label names' tab selected. Within this tab, the 'Attendance' sub-tab is active. A red message at the top states: 'After making changes, RESTART this application for the new value or setting to take effect.' Below this, there are three text input fields labeled 'Code:', 'Hours 1:', and 'Hours 2:'. At the bottom of the window, a note reads: 'The names of the labels can be changed to a more suitable name to meet your requirements.'

These are variable field names appearing in the [Attendance System](#).

Label names – Employer/Company

System Settings

User Information Environment Options Defaults **Label names** Batch number Customisation

After making changes, RESTART this application for the new value or setting to take effect.

System Contact Codes Checkboxes Personal Activities Invoice Enrolments/Subscriptions Attendance **Company**

Segment code:

Checkbox 1:

The names of the labels can be changed to a more suitable name to meet your requirements.

These are variable field names for the [Employer System](#). Type a new label to change throughout the application.

Batch number

System Settings

User Information Environment Options Defaults Label names **Batch number** Customisation

Batch

Current batch number:

Batch creation date:

The Current batch number - this is one of three places where you can set up a batch number.

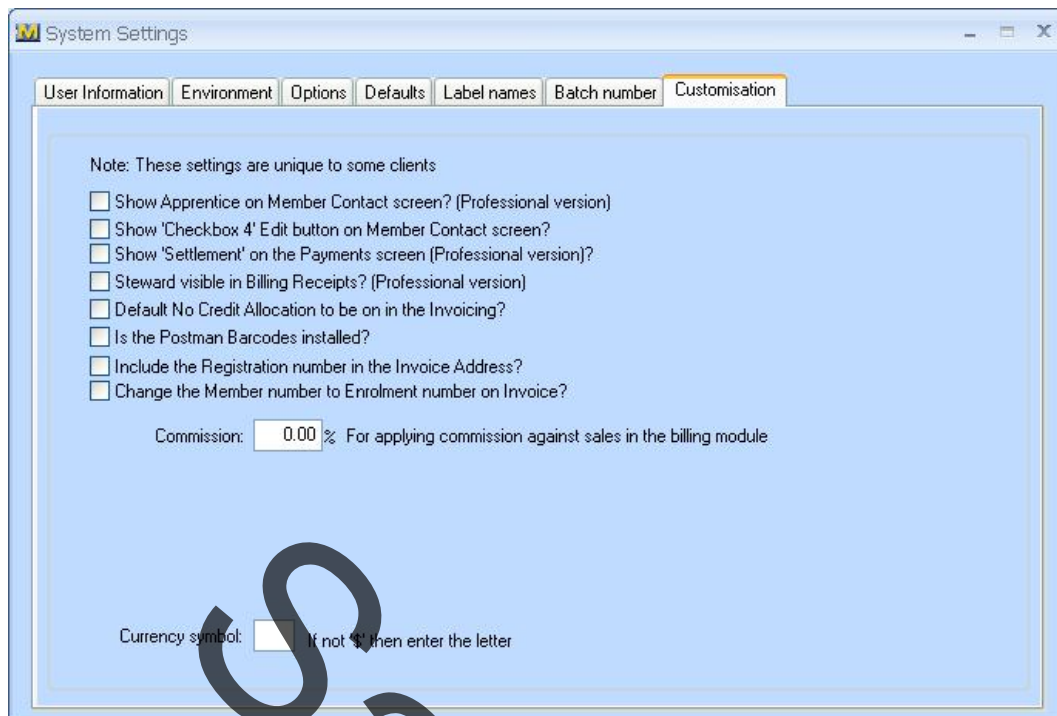
Additionally, in this System Setting, **you are assigning this batch number to be the current batch number**. The current batch number is always displayed here but can be overwritten.

Batch numbers are user defined, they are not automatically generated, nor incremented. Users commonly set batch number to a date (yyyymmdd).

Batch creation date – a read-only field displaying the date on which the current batch number was created.

i All changes must be SAVED.

Customisation



Set to accommodate unique client requirements

Set Background On/Off

You set the system to display or not display a background image.

To set up your own image, add your image file (named **MASSback.bmp**) to *members/bitmaps* directory. The file is tiled to fill the background area.

ADD/EDIT CODES

Membership Codes

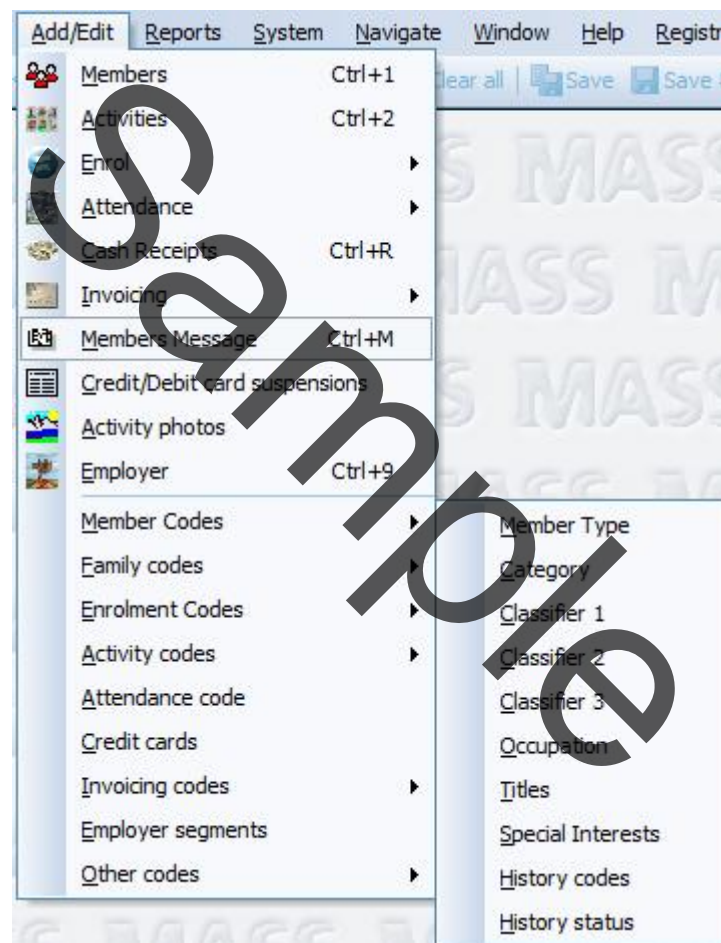
MASS has many look-up codes that allow you to classify your membership and their activities. You do not have to use any, or all of these codes, but they allow for more detailed analysis of your members, activities and companies.

In the Add/Edit menu, codes are grouped according to the screen on which they appear.

It is possible in [System Options](#) to make some codes invisible – you may decide to do this for a code which has no purpose in your organization.

Remember you also have access to four checkboxes for recording yes / no responses.

From the *Add/Edit* pull-down menu, select the code you want (figure below illustrates Professional version screen).



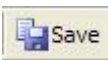
i It is advisable to PRE-PLAN your use of these codes & checkboxes. Make a list of the codes currently in use and of any others you would like to have and then match these against the ones available in **MASS**.

i Before entering a new code record, clear the screen [F5]. This occurs automatically after each [F2] save.

To view any data/values that may already be entered press the  button or [F4] and a [Look-up](#) table will display. Initially, most codes will have no entered values.

To enter values (from a clear screen), just begin typing. TAB or ENTER from one field to the next. A description is not necessary, often only the *Code* is displayed on the screen or in a report. It is therefore advisable to set up meaningful codes.

The *Code* and *Description* can be entered in upper and/or lower case.

Press [F2] or  icon to save code. This will clear data, ready for further data entry.

Member Codes

Initially your **MASS** database is empty. The codes shown here are examples of how you can structure it to meet your requirements.

Member Type (Professional version)

Member Type drives the invoicing process – a Member type is a mandatory reference table. It categorises members into the different membership groups.

Includes Newsletter? – allows the membership to be filtered according to whether or not they receive a newsletter – for example, useful for the generation of newsletter address labels in [Member List](#) or [Mail Merge](#).

Add to Member Type Group? – allows the grouping of Member Types so that they can be reported as one group.

Not invoiced? – when this is checked, **MASS** will not allow an invoice to be generated for any member with this Member Type.

i Invoices CANNOT be generated for Inactive members or those whose Member Type is NOT invoiced.

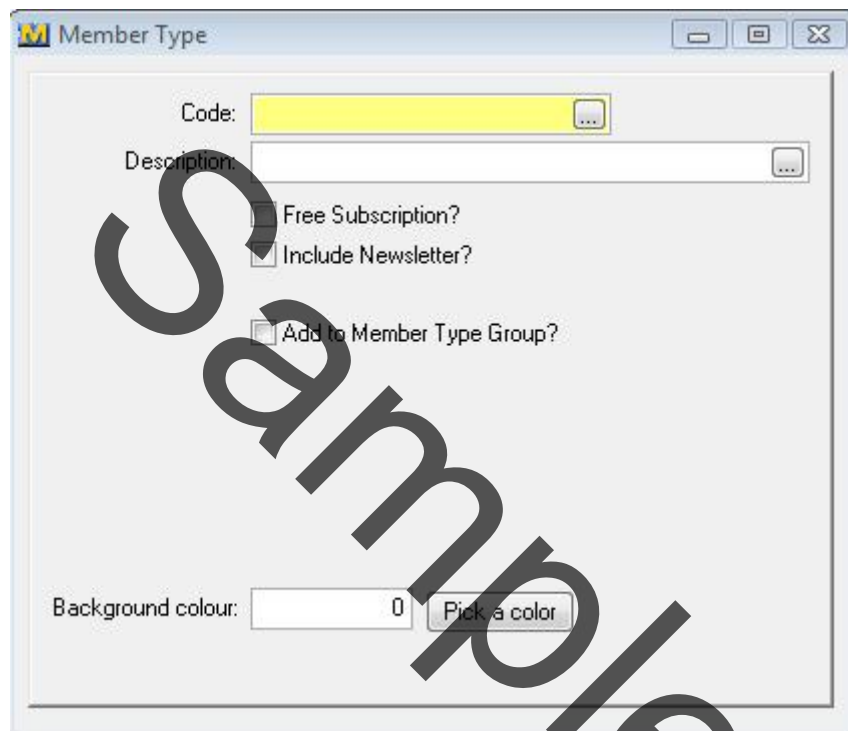
Total Fee – shows the total of the fee components.

Tax included – in [System Settings > Defaults](#) you can set Tax Applicable ON and specify a tax rate. When this is turned on **MASS** automatically calculates the tax included in a fee.

Background colour – assign a background colour to a Member Type which displays in the [Contact Tab](#).

Fee components – click this button to see the different [Fee components](#) which have been assigned to this Membership Type or to go to that screen to set them up.

Member Type (Standard version)



The screenshot shows a window titled 'Member Type'. It contains the following fields and options:

- Code:** A text input field with a yellow background and a dropdown arrow.
- Description:** A text input field with a dropdown arrow.
- ☐ **Free Subscription?**
- ☐ **Include Newsletter?**
- ☐ **Add to Member Type Group?**
- Background colour:** A text input field containing the value '0' and a 'Pick a color' button.

A large diagonal watermark reading 'Sample' is overlaid on the form.

Free Subscription? – during End of Period Preparation>[Update Subscription Paid, Status and Date left](#) this category of members automatically get the subscription period allocated to them without having to pay a subscription.

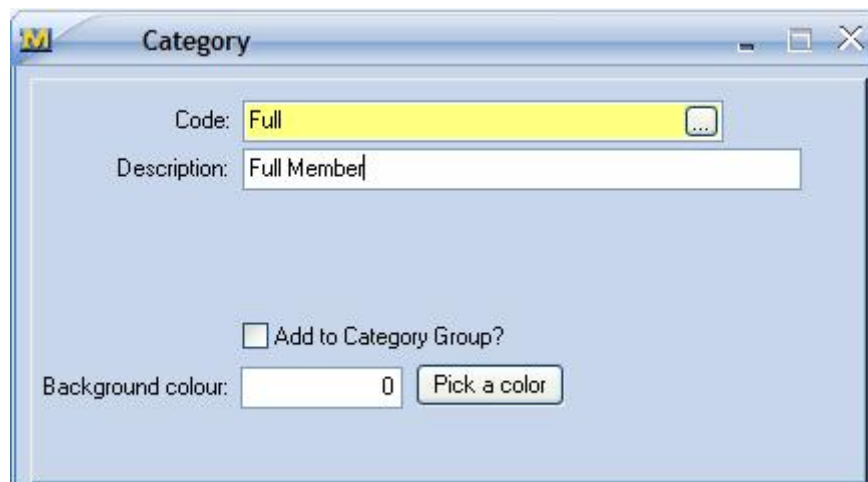
i Both Member Type and Category offer this Free Subscription functionality.

Includes Newsletter? – allows the membership to be filtered according to whether or not they receive a newsletter – for example, useful for the generation of newsletter address labels in [Member List or Mail Merge](#).

Add to Member Type Group? – allows the grouping of Member Types so that they can be reported as one group.

Background colour – assign a background colour to a Member Type which displays in the [Contact Tab](#).

Category (Professional version)



Another way of categorising/classifying members.

Add to Category Type Group? – allows the grouping of Categories so that they can be reported as one group.

Background colour – assign a background colour to a Category which displays in the [Contact Tab](#).

Category (Standard version)



As per for Professional with added functionality.

Free Subscription? – during End of Period Preparation>[Update Subscription Paid, Status and Date left](#) this category of members automatically get the subscription period allocated to them without having to pay a subscription.

i Both Member Type and Category offer this Free Subscription functionality.

Classifier 1, 2 and 3



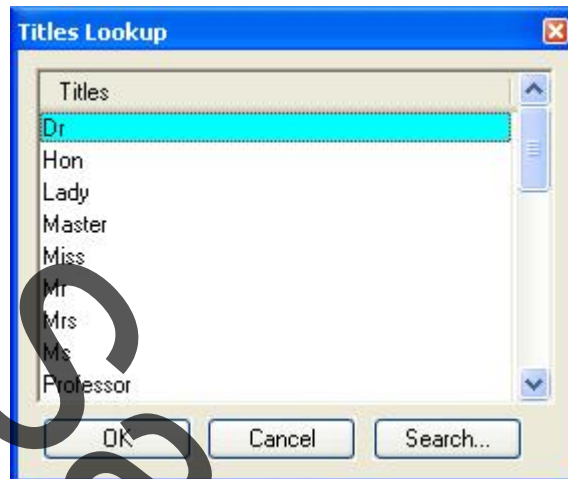
These codes can be used as a general means of classifying.

Occupation

A dialog box titled "Occupations" with a blue header bar. It contains a single text input field labeled "Code:" with a yellow background and a small dropdown arrow on the right.

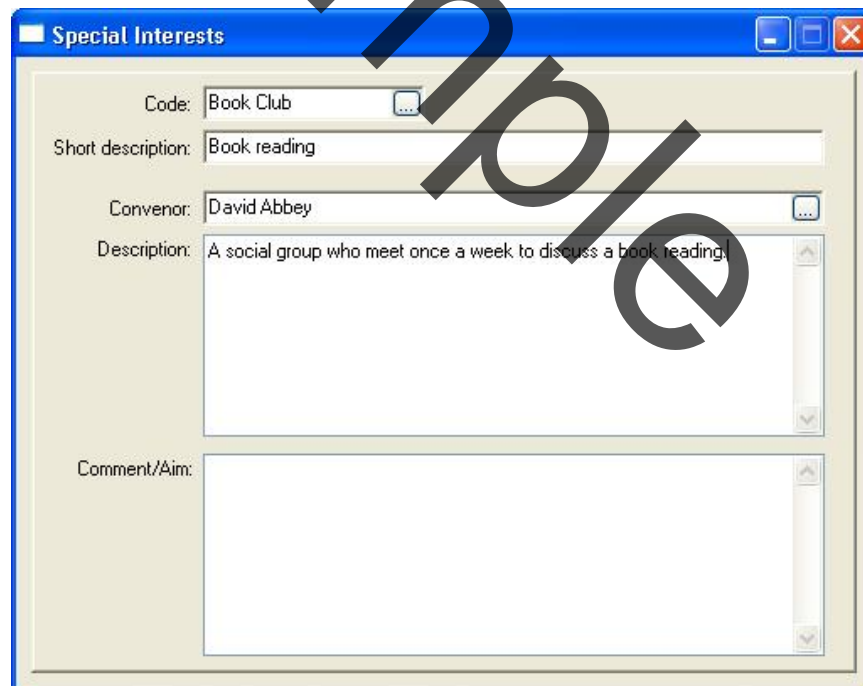
Allows the user to set up a number of different occupation codes to be used for a Member.

Titles

A dialog box titled "Titles Lookup" with a blue header bar. It features a list box containing the following titles: Dr, Hon, Lady, Master, Miss, Mr, Mrs, Ms, and Professor. The "Dr" title is currently selected and highlighted in cyan. At the bottom of the dialog are three buttons: "OK", "Cancel", and "Search...".

MASS comes pre-seeded with titles, but you can add extra ones.

Special Interests

A dialog box titled "Special Interests" with a blue header bar. It contains several fields: "Code:" with a dropdown menu showing "Book Club"; "Short description:" with a text box containing "Book reading"; "Convenor:" with a dropdown menu showing "David Abbey"; "Description:" with a large text area containing "A social group who meet once a week to discuss a book reading"; and "Comment/Aim:" with another large text area. Each dropdown menu has a small arrow on its right side.

MASS allows multiple special interests to be assigned to a member in [Special Interests Tab](#). Each interest can be assigned a Convenor and have some descriptor text added. The convenor's name is either found from the members table or typed in.

This functionality may be used for other purposes such as: recording Committees and their members; Certificates members hold.

History code



History Codes

Code: Bridgement Resi

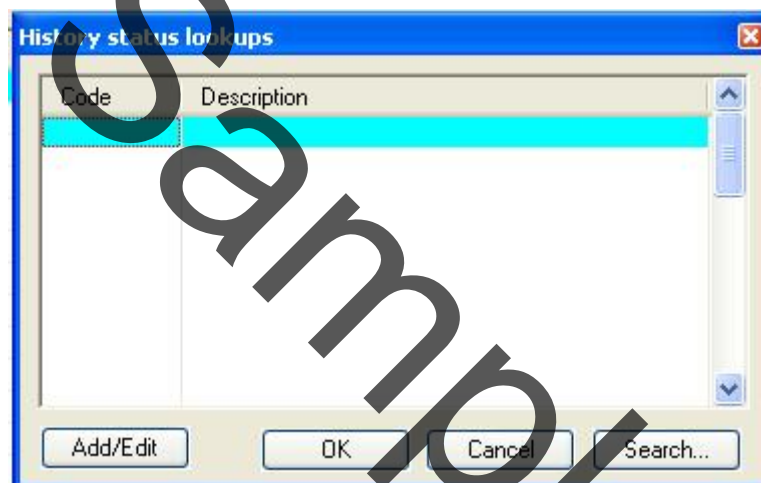
Description: Acc cleared but still owes money

These codes are used in the [History Tab](#) of the Member's screen to categorize the recorded history events.

History events are either generated automatically by **MASS** (such as details of letters sent; date joined) or manually entered by the user.

MASS has a number of pre-programmed values which it writes into the code table when first used. Such codes include: Join Date, Date Left, Letter (each time their name is used in a merge document), Code (records change of either Member Type or Category). The user can add their own codes to be used against manual entries.

History status



History status lookups

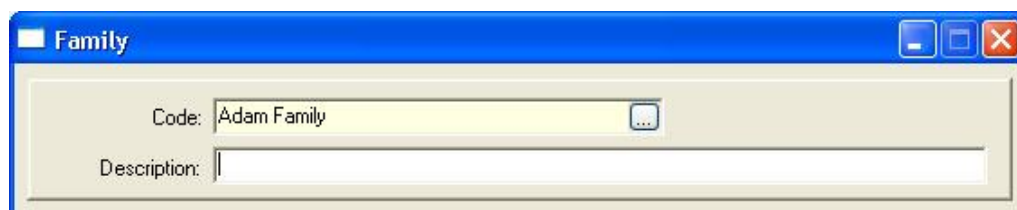
Code	Description
------	-------------

Add/Edit OK Cancel Search...

An additional means of categorising a member history entry in the [History tab](#).

Family codes

Family



Family

Code: Adam Family

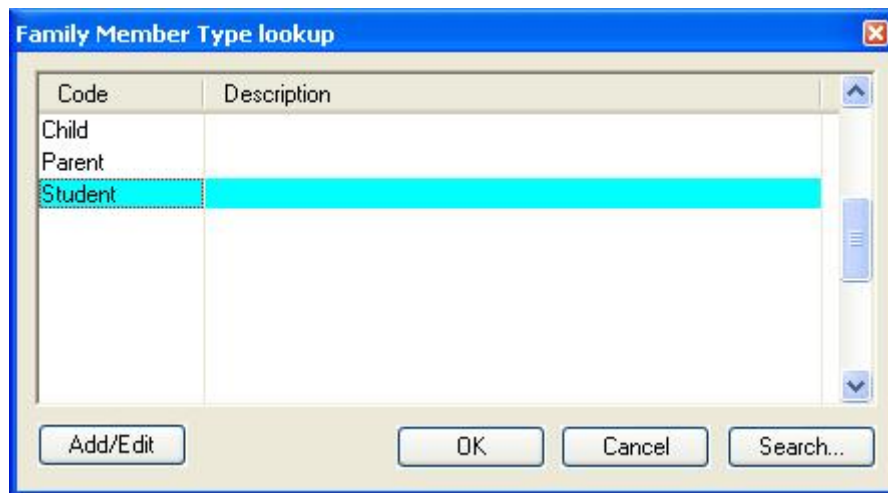
Description:

The *Family Module* enables members to be grouped as a Family. A report can be generated identifying families and their members and you can do a bulk change of a family address at [Systems > Maintenance > Bulk Change of Family Address](#).

This code assigns each *Family* an identifying name.

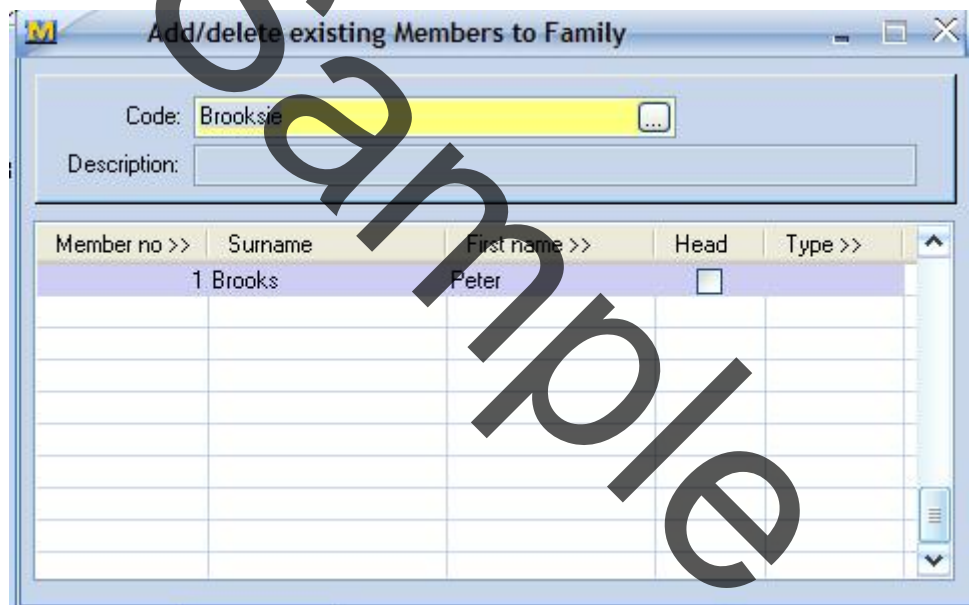
A *Family* cannot be deleted once members have been linked to it. Family members must first be individually deleted from the Family.

Family Member Type



Specify positions within the family - for information only. The word Head SHOULD NOT be used as a family member type – Head is a code which has a special meaning within MASS.

Add / Delete Existing Members



In this screen you can:

- add / delete members to / from a family group;
- view the members of a family; and
- edit Head and Family Member Type.

[Look-up](#) a member and add to the table.

If this screen is accessed from the Member's screen, the member is automatically added to the family.

You may optionally assign a [Family Member type](#). Don't forget to assign one member as the Head !

i Family members MUST ALREADY EXIST in the system before they can be added in *Add Existing Members to Family*.

The Head and [Family Member Type](#) are for information only. See *Reports* for the Family Listing report.

Family - Create New Member Details

Family - create new member details from:-

Code:

Description:

Surname: No:

First name:

Existing family members

Member	Surname	First name	Employer	Head	Type >>
1	Brooks	Peter		☐	

Enter new members to be added to the database

Surname	First name	Birth date	Gender	Head	Type >>
Brooks	Marnie	01/02/2001	F	N	

When a Family is found, **MASS** finds a member of that family and uses them as the reference member, showing their *Surname* and *First name*. If you activate this screen direct from the [Member System](#) then that Member becomes the default.

The purpose of this screen is twofold:

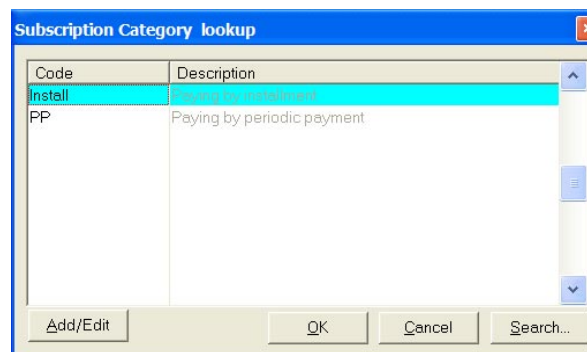
- It allows the user to view existing family members in the top table of this screen.
- It can be used to add another family member to **MASS** using the lower table of this screen. The advantage of this method is that it saves typing the contact details of each member – just enter them for one member and then those details are copied into each subsequent member's record!

This second process is as follows:

- Set up [the Family](#);
- Enter one family member into **MASS**, with their full contact details;
- Add this first member **to the Family** by using either:
- the Related members function in the [Codes Tab](#); OR
- [Add/Delete existing Members to Family](#) – stating their Family Member type (optional) and designating as *Head*, if appropriate;
- Bring up [Family - Create New Member Details](#) and add subsequent **NEW** member's limited details; press the **Add New Member Records** button (a new record is created duplicating the first member's contact details (Address, Phone)).

i The lower table is used to enter NEW members into **MASS** whilst also assigning them to the family.

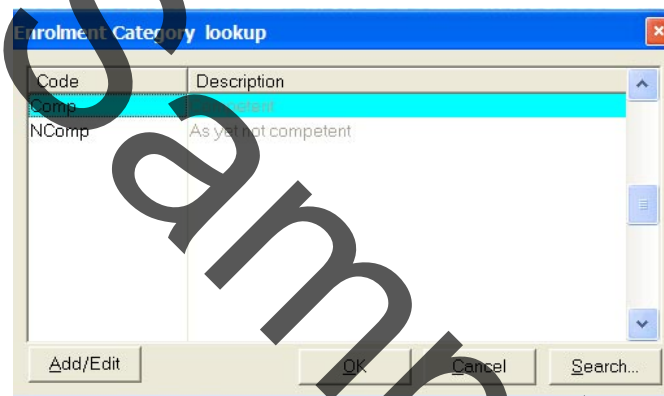
Subscription Category (generally only in Standard version)



Used to categorize a member's subscription. For instance, in Standard version it may be used to designate a subscription which is fully paid / partially paid / as yet unpaid (this information can be found out other ways but some users find it useful to display this information on this screen).

Enrolment Codes

Enrolment Category

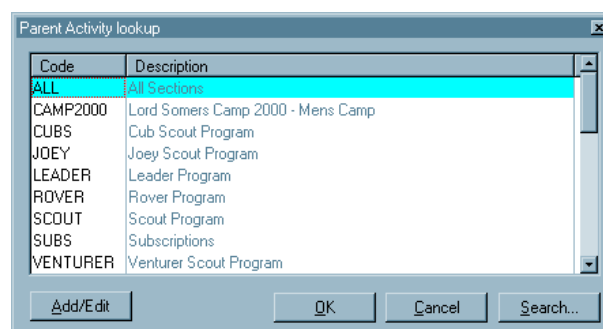


Enrolment Category 1 and *Enrolment Category 2* are used to categorize a member's enrolment in an activity ([Enrolment tab](#)). For instance, it may be used to:

- designate an enrolment which is fully paid / partially paid / as yet unpaid (this information can be found out other ways but some users find it useful to display this information on this screen); or
- assign an activity result *after the activity* [this is useful only if Attendance module is not activated]. For instance: pass/fail; attended/not attended; Competent/Not yet competent.

Activity Codes

Parent Activity code



Used to designate a cluster of activities linked under this parent code. Used in reporting to select a cluster of related activities.

Activity Location

The 'Activity locations' window contains the following fields:

- Code: []
- Description: []
- Address: []
- Address2: []
- Suburb: []
- Code: [] Post Area: []
- Country: []
- Phone: []
- Mobile: []
- Email: []

Allows the storage of Activity Location details which could then be recorded against an Activity. The location code can relate to such items as: room number, campus, campsite, city, town etc.

Activity Category 1, 2 and 3

Code	Description
Lond	
Melb	Melbourne
NY	New York
Syd	Sydney

Further methods by which your activities could be categorised.

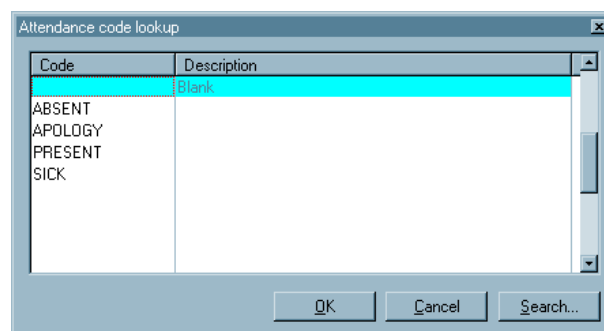
Activity Accounts code

The 'Activity Accounts' window contains the following fields:

- Code: 82020
- Description: Hire of Power House - Other tenants

A facility to record an accounting code that can be applied to your activities.

Attendance Code (only if Attendance module turned-on)

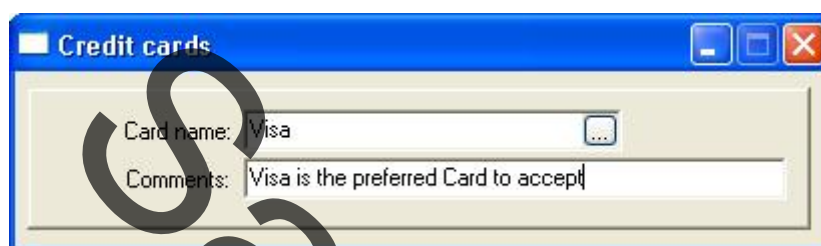


The 'Attendance code lookup' dialog box contains a table with two columns: 'Code' and 'Description'. The 'Code' column lists 'ABSENT', 'APOLOGY', 'PRESENT', and 'SICK'. The 'Description' column shows 'Blank' for the first row. At the bottom, there are 'OK', 'Cancel', and 'Search...' buttons.

Code	Description
ABSENT	Blank
APOLOGY	
PRESENT	
SICK	

Used to assign a status or result to an activity attendance (see [Attendance System](#)) such as good/poor/excellent; pass/fail; attended/not attended; Competent/Not yet competent.

Credit Cards

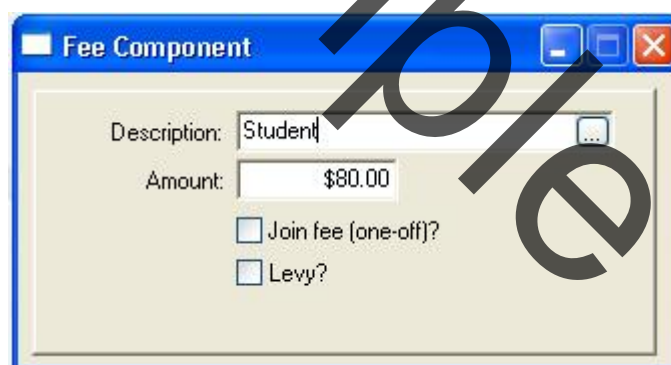


The 'Credit cards' dialog box has a 'Card name' field with 'Visa' entered and a 'Comments' field with 'Visa is the preferred Card to accept' entered. There are standard window controls at the top right.

Used to record credit card types, and related merchant name, number, location and comment details.

Invoicing (Professional version)

Fee Component



The 'Fee Component' dialog box has a 'Description' field with 'Student' entered and an 'Amount' field with '\$80.00' entered. Below these are two checkboxes: 'Join fee (one-off)?' and 'Levy?'. There are standard window controls at the top right.

Fee components accumulate to make up a [Member Type fee](#).

Fee components include such things as joining fees, levies, newsletter and regular fees.

Description - enter a meaningful description up to 20 characters.

Join fee – stipulates that this particular fee component should only be applied ONCE only – MASS includes this in the first invoice for a Member, thereafter this fee is not included in an invoice.

i When the member is invoiced for the first time for a membership which includes a Join fee component, this information is recorded in the [Member> Personal > Fees](#). At that screen it is possible to further manage the Join Fee (eg exempt it).

Levy? – when [invoicing](#), you can elect to exclude any fee component which is a levy from invoices run over a particular billing period. You do this either at the Invoicing screen (for that invoice batch run) or at the Billing Period screen where you can exclude levies for an entire [Billing Periods](#).

Member Type – Fee Components

Date >>	Description >>	Join Fee	Levy	Tax >>	Apply first...	Amount
03/05/2005	Join Fee	☒	☐	☒	☒	\$50.00
03/05/2005	Regular	☐	☐	☒	☒	\$250.00
05/05/2005	Tech upgrade levy	☐	☒	☒	☐	\$10.00
03/05/2005	Tsunami levy	☐	☒	☒	☐	\$5.00

Amount: 315.00

You assign Fee Components to Member Type in this screen. You must have set up the [Member type](#) and the [Fee Components](#).

Look-up the [Member Type](#) and then, *Look-up* the appropriate [Fee Component](#). You may optionally record the date of adding the component.

The Join, Levy and Amount fields are read-only and reflect the particular [Fee Component](#).

Tax - You may indicate that a fee component is inclusive of tax in this screen. The tax functionality must be turned on in System Settings > [Defaults](#).

Apply first? – When a payment is made, if it is incomplete, the Apply first? Field specifies which component is paid first – it prioritises the components. More than one component can be selected – **MASS** then awards the fees paid against those components.

Member Type – Current Balance range

Code: Test

Description:

Balance From: \$0.00

Balance To: \$0.00

The Current Balance range is used as a filter in some items of the [Reports - Invoicing](#) and in the statistical function: [Calculate, Store and Report Statistics](#)

Payment Codes

Code	Description
Adjust	Adjust
Cash	Cash
CC	Credit card
Cheque	Cheque
EFT	Electronic funds transfer
EFTPOS	EFTPOS

This code is used to indicate a payment type when an adjustment is made in either the [Member Invoices](#) or [Invoice Details](#) screens. It comes pre-filled with some values, but the user may add additional ones.

Adjustment Codes

Code	Description
Adjust	Adjustment
Away	Away from trade
Chq Fee	Dishonoured cheque fee
Data	Data entry error
Deceased	Deceased
DF Levy	
Dishonou	dishonoured cheque
Enrol	
Entry	Entry

The adjustment code allows invoice transaction adjustments to be categorized (eg dishonoured cheque, refund, overpayment).

It is used in both the [Invoice Details](#) and [Member Invoices](#) screens.

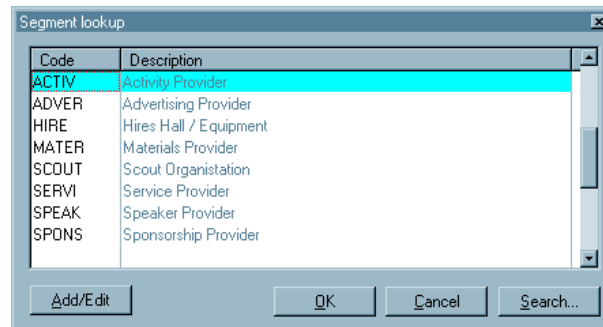
Billing Period

Sets up the billing periods used in the [Invoicing System](#). Whenever an invoice is generated (either individually or bulk) it must be assigned to a billing period. Most commonly the billing period will be 12 months. Dates are inclusive!

Description – use a meaningful statement eg Billing for 2005.

Exclude levies? – you can elect to exclude all levy components from all [Fee Component](#), for a particular billing period. Alternatively, you can exclude levies for individual batch runs at the [Invoicing Screen](#).

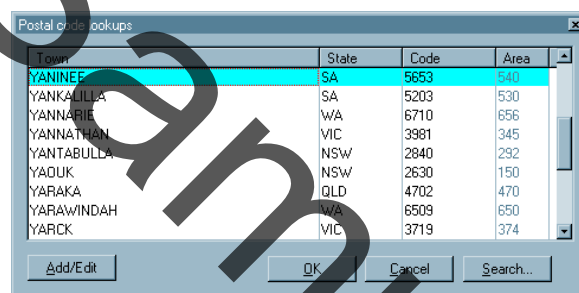
Employer Segments



A method by which Employer records can be segmented eg industry segments; public/private; primary/secondary.

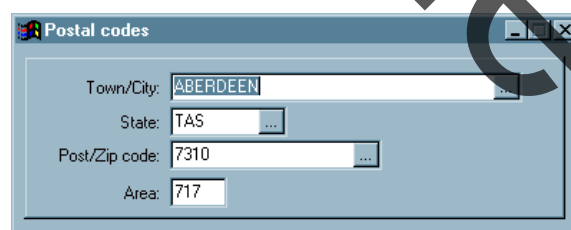
Other Codes

Postal codes

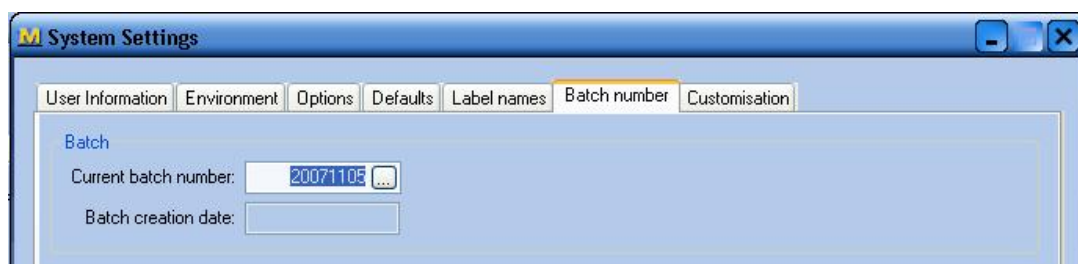


MASS contains a look-up table of most Australian postcodes and special postal area codes that allow for bulk postage discounts by Australia Post. Zip/post codes for other countries can be [imported](#) into this file.

To edit or add additional postcodes use the postal codes window shown below.



Cash Receipts Batch Numbers



Batch numbers are user defined, they are not automatically generated, nor incremented. Users commonly set batch number to a date (yyyymmdd).

This is one of three places where you can add a batch number. You can also do this in [Payments Received](#) and [Enrol](#).

It is the only place where you can add a description to your batch number.

MEMBER SYSTEM

The Membership screen appears on starting up **MASS**. Alternatively, clicking *Members* on the [Add/Edit](#) pull-down menu accesses it. It stores the personal data of members, including names, addresses, phone and fax numbers, email and web addresses.

Details are spread over several Tabs.

After [Setting-up MASS](#) the Member's screen could appear in a multitude of ways depending on your chosen selections. You may have

- changed field / label names;
- changed Tab names;
- changed the position of some fields – either on the screen or to a different Tab;
- made some fields invisible; or
- entered your own values into the various classifier codes.

i The Tabs presented below are shown as they are originally set in **MASS** when it is downloaded – before any user changes to label names or position.

Contact Tab

Many of these fields are self-explanatory. Some of these fields can be moved or made invisible if desired.

i **Active** – if the *Date left* field is blank a green tick  will appear automatically.

Inactive - If the *Date left* field is filled a red cross  will appear automatically.

There is an routine to automatically de-activate members according to a set of criteria: System > End of Period Preparations > [Update Newsletter, Inactive and Date Left](#)

Standard version: There is a routine to automatically de-activate members who have not paid their subscriptions in [End of Period preparation>Update Subscription paid, Status and Date Left](#)

Standard version: In Standard the three buttons pictured above are replaced by: Enrol, Subscribe, Activities screen